Alberta Downhill Ski Market Analysis 1983/84

Summary Report

1983/84 ALBERTA DOWNHILL SKI

MARKET ANALYSIS

Prepared for

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I. INTRODUCTION

Manecon Partnership, Management and Economic Consultants, of Edmonton, Alberta, was engaged by Travel Alberta to research the 1983/84 Alberta ski market. The study was conducted to provide a composite analysis of resident and non resident downhill skiing with the following objectives:

OBJECTIVES

1. To determine the present size and composition of the Alberta ski market.
2. To determine present skiing patterns of Albertans in and outside Alberta.
3. To provide an analysis of non residents using Alberta ski facilities.
4. To determine resident skier expenditures and spending patterns within and outside Alberta and non resident expenditures in the province.
5. To profile resident and non resident skiers.
6. To examine the motives for skiing the areas patronized.
7. To examine skier attitudes towards facilities, services, and other conditions at the ski areas patronized.

DEFINITIONS

Definitions used in the study are provided in Appendix 1 at the back of this report.

METHODOLOGY

The study began by conducting surveys of two separate components of the market:

1. Telephone interviews with Alberta resident skiers, and
2. On site personal interviews with non resident skiers.

Interviewers for the on site survey were provided by the ski areas. The survey was directed by Market Facts of Canada Limited.

Interviews with resident and non resident skiers took place during four interview periods in the 1983/84 ski season. These periods were at Christmas/New Year, early winter, late winter and spring. The resident component included 707 interviews, and 1,116 interviews were conducted with non residents.

Examples of the questionnaires used for interviews with residents and non residents are included as Appendix 2.

The data from the surveys were compiled to result in market estimates based on skiers, skier days, and expenditures.

The interpretation contained in this report is based on examination of cross tabulations provided in the detailed tables, with minor corrections for consistency.

The detailed tables and a technical description of the survey methodology are available, bound separately.

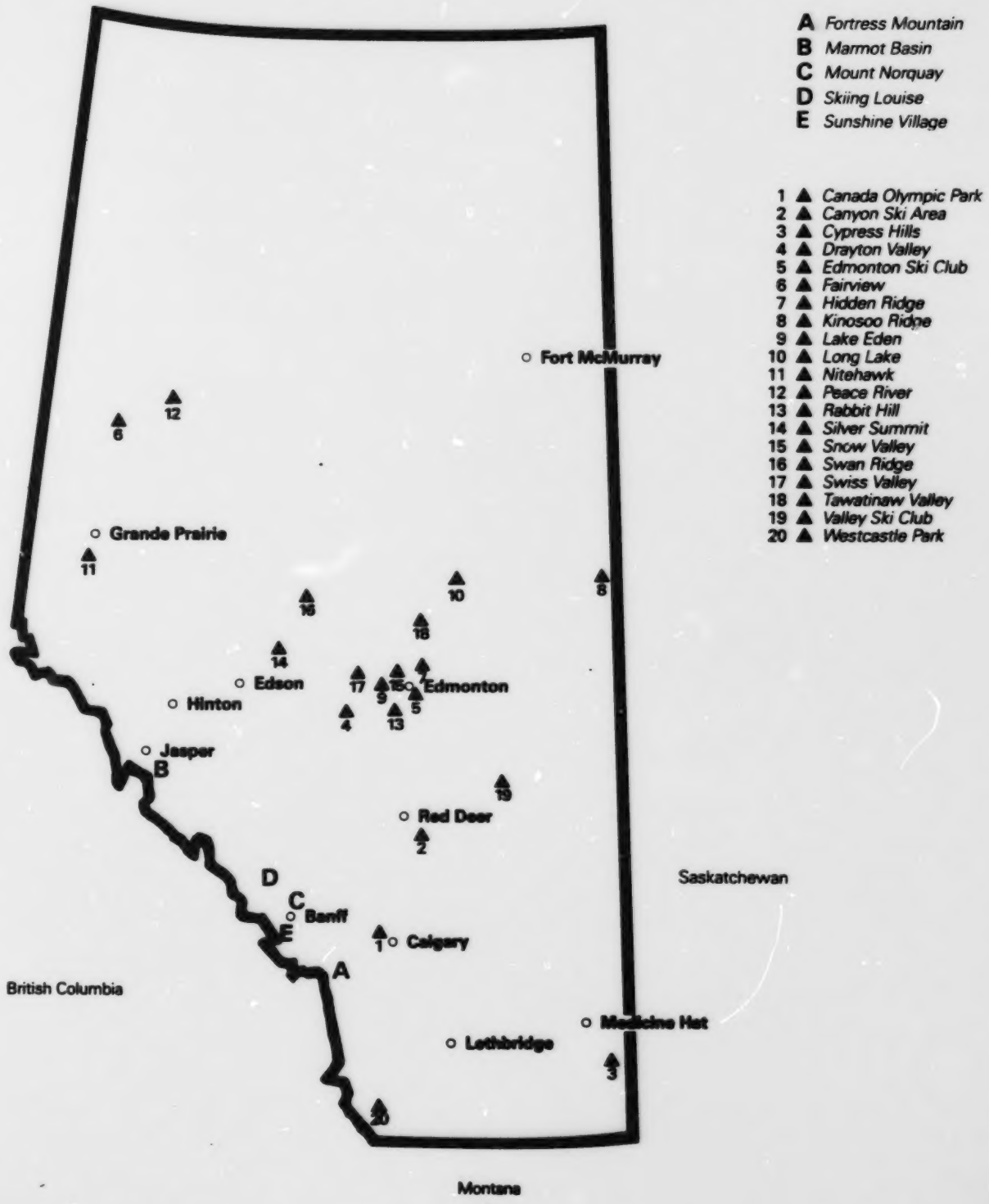
GEOGRAPHY

Map I.1 shows the location of Alberta ski areas. Alberta skiers also ski extensively in British Columbia and in the United States and these destinations are addressed as necessary in the report.

ORIGIN

The origin of skiers is broken down into those who live outside of Alberta (non residents) and those who live in Alberta (residents). Non residents could come from any place in the world, but more practically originate mostly in other Canadian provinces or in the United States.

Map I.1 **Downhill Ski Areas in Alberta**



Throughout the study the analysis of resident skier origin was based on the market areas shown on Map I.2. A list of the key communities included in each area is provided in Appendix 3.

Calgary & Region

This area includes the Calgary/Canmore corridor and the Banff area. On the basis of Alberta Bureau of Statistics and Statistics Canada information, the 1984 population of this area was estimated at 684,000 people. The City of Calgary, referred to as Calgary Metro in the study, is a significant sub area.

Edmonton & Other Major Centres (OMC)

Although geographically segmented, this region contains a number of major concentrated urban populations. The area around Marmot Basin has also been included in this region even though its population is not as dense. The estimated 1984 population for this region is 944,000 people based on information provided by Statistics Canada and the Alberta Bureau of Statistics. Greater Edmonton, including the City of Edmonton and the surrounding communities, is a major sub area.

Regional Market

The Regional Market within Alberta includes most populated rural areas in the south western and middle part of the province and the cities of Grande Prairie and Medicine Hat. The 1984 population for this region was estimated at 502,000.

Hinterland Market

The final Alberta market area identified includes the relatively lightly populated area in the northern portion of the province and the eastern side of Alberta. Among the provincial market regions, the Hinterland areas are generally the greatest distance away from the major ski areas. The 1984 population of the Hinterland region was estimated at 231,000 people.

Map I.2 **Market Areas in Alberta**

Calgary & Region
Calgary Metro
Other Calgary

Edmonton & Other Major Centres
Edmonton Metro/Greater Edmonton
Jasper/Hinton/Edson Lethbridge Red Deer

Regional
Grande Prairie
Medicine Hat
Rural Communities

Hinterland

II. SUMMARY OF THE RESULTS

The following comments summarize the results of the 1983/84 Alberta Downhill Ski Market Study.

Market Size and Composition

- The skiing population was estimated as 317,800 skiers, including 30,000 non residents of Alberta and 287,800 residents.
- Over 1.76 million skier days were skied in total, including 1,116,700 skier days in Alberta and 462,200 skier days Out-of-Province by residents of Alberta, and 184,800 skier days in Alberta by non residents.
- Alberta residents skiing in Alberta skied 695,500 skier days at Rocky Mountain ski destinations and 421,200 days at other Alberta ski areas.

Skier Expenditure

- Total expenditure by skiers included $115.1 million on skiing and a further $41.3 million on ski clothing and equipment.
- Resident skiers spent $61.8 million on skiing in Alberta and $32.0 million outside the province.
- Non resident skiers spent $10.7 million less on skiing in Alberta than residents spent outside the province.

Skier Behavior

- The participation rate of skiers in the total Alberta population is 14.2%. Nearly 14% of Calgarians ski at Rocky Mountain ski areas in Alberta.
- Private automobile is the selected means of transport by nearly 80% of resident skiers and 50% of non residents.

- Resident skiers ski 55% of their Alberta, Rocky Mountain skiing and 95% of their other Alberta skiing on trips of one day duration.

Skier Profile

- Among resident skiers, over 60% are male, nearly 60% are under 25 years old and 35% are students.
- Over 30% of skiers are young bachelors or are members of a young married or unmarried couple living together.
- Over 50% of skiers classify their skill level as "intermediate".

Skier Motivation

- Rocky Mountain skiers are most attracted by issues of skiing quality.
- Foothills and Flatland skiers are most attracted by convenience.
- Over 60% of skiers whose opinion on snow making was asked gave neutral or non committed answers.

Trip Experience

- Nearly 40% of skiers rated their trip as "excellent" and over 50% "good".
- Non residents skiing in Alberta were more satisfied with their trip to Alberta Rocky Mountain ski areas than residents were with theirs.
- Residents skiing Out-of-Province were more satisfied with their trip than non residents were with their trip in Alberta, or than residents skiing Rocky Mountain ski areas were with their trip.

III. MARKET SIZE AND COMPOSITION

The study addressed skiers who reside in Alberta and also non resident skiers; that is, people who skied in Alberta, but do not live in Alberta. With respect to residents of Alberta, the examination included skiing at Rocky Mountain ("RMS") and Foothills and Flatland ("F&F") ski areas in Alberta and at Alpine ski resorts outside of the province ("OOP"). Only Rocky Mountain skiing in Alberta was analysed for non residents.

Skiers over 12 years of age were surveyed. The survey period commenced at the start of the 1983/84 ski season and concluded on April 30, 1984. By that date most ski areas had closed for the season. Sunshine Village, however, remained open until June 10, 1984.

The survey data revealed that 317,800 skiers skied 1,763,700 skier days. Based on skier day counts from Sunshine Village and a household methodology for calculating the activity by under 13 year olds it is estimated that as many as 350,000 skiers skied in excess of two million skier days in Alberta during the full season. However, no detailed analysis was conducted of the under 13 year old skiers, nor of skiers at Sunshine Village between April 30 and June 10, 1984. **This report, therefore, deals only with the data and analysis resulting from the survey.**

HIGHLIGHTS

* The survey identified a market of 317,800 skiers:

Residents of Alberta	287,800
Non Residents	30,000
	317,800

* Over 1.76 million skier days resulted from the activity of these skiers:

o Activity of Resident Skiers:	Skier Days	%
RMS in Alberta	695,500	39.4
F&F in Alberta	421,200	23.9
Out-of-Province	462,200	26.2
Total Resident Skier Days	1,578,900	89.5
o Activity of Non Residents:		
RMS in Alberta	184,800	10.5
Total Resident & Non Resident Skier Days	1,763,700	100.0

* Out-of-Province skiing by residents accounts for:
  - o 30% of all Resident skier days
  - o 40% of Alpine skier days (i.e. excluding Foothills and Flatland)
* Only 10.5% of skier days in the Alberta market are skied by non residents
* Two and a half times as many days are skied outside Alberta by residents as are skied in Alberta by non residents
* One quarter of skiing by Alberta residents takes place at Foothills and Flatland destinations
* Over 60% of all skiing by Alberta residents, and over 75% of resident, Rocky Mountain skiing, originates in the major populated areas of Metropolitan Calgary and Greater Edmonton (including Metropolitan Edmonton and the surrounding municipalities).

STRUCTURE OF MARKET

The structure of the market is presented in Table III.1 which shows the origin of skiers and skier days, and in Charts III.i and III.ii, which describe in skier days the origin and destination of skiing activity.

TABLE III.1 **THE ALBERTA SKIING MARKET**

ORIGIN	SKIER DAYS ('000)	SKIER DAYS (% of Market)	SKIERS ('000)	SKIERS (% of Market)
CAPTURED MARKET:				
Alberta Resident				
Calgary & Region	454.5	25.8	93.0	29.3
Calgary Metro	405.9	23.0	83.0	26.2
Edmonton & OMC	451.2	25.6	86.8	27.3
Greater Edmonton	394.8	22.4	69.6	21.9
Regional	136.3	7.7	38.9	12.2
Hinterland	74.7	4.2	21.5	6.8
Total Alberta Res.	1,116.7	63.3	240.2	75.6
Non Resident				
Canadian	125.6	7.1	22.5	7.1
U.S.	39.5	2.3	5.5	1.7
Other	19.7	1.1	2.0	0.6
Total Non Res.	184.8	10.5	30.0	9.4
TOTAL CAPTURED MARKET:	1,301.5	73.8	270.2	85.0
ESCAPING MARKET:				
Alberta Resident				
Calgary & Region	224.8	12.7	27.8	8.8
Calgary Metro	207.4	11.8	25.6	8.1
Edmonton & OMC	150.9	8.6	19.9	6.3
Greater Edmonton	82.8	4.7	7.9	2.5
Regional	74.6	4.2	15.3	4.8
Hinterland	11.9	0.7	3.1	1.0
TOTAL ESCAPING MARKET:	462.2	26.2	66.1	20.9
OVERLAP; CAPTURED/ESCAPING			(18.5)	(5.9)
TOTAL CAPTURED AND ESCAPING MARKET	1,763.7	100.0	317.8	100.0

Chart III.i **Market Size: 1,763,700 Skier Days**

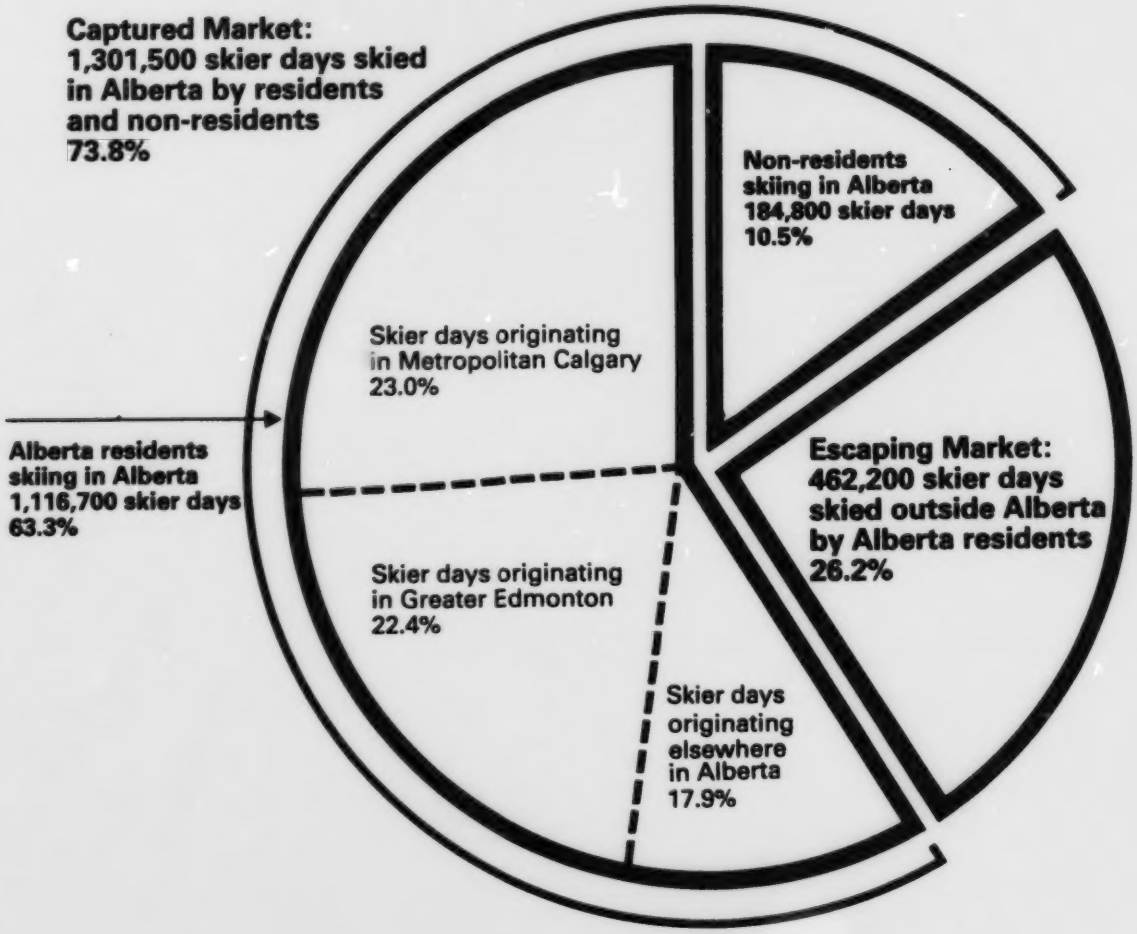


Chart III.ii **Destination of Skier Days**

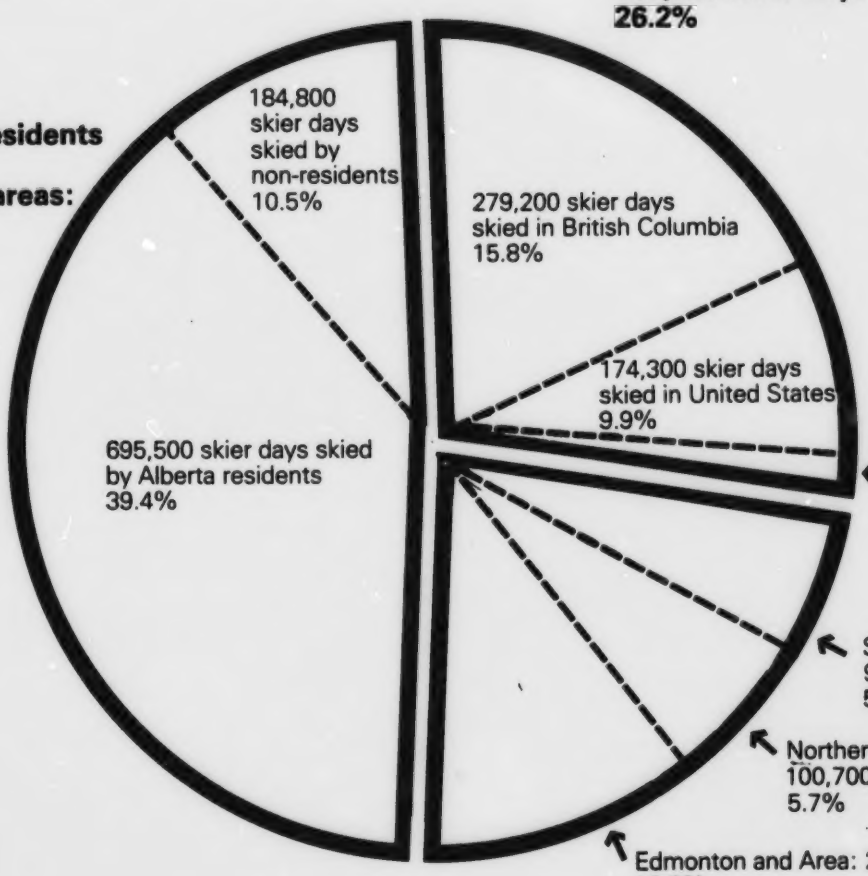

Residents skiing Out-of-Province: 462,200 skier days 26.2%
esidents and non-residents kiing Alberta ocky Mountain ski areas: 80,300 skier days 9.9%
184,800 skier days skied by non-residents 10.5%
279,200 skier days skied in British Columbia 15.8%
174,300 skier days skied in United States 9.9%
695,500 skier days skied by Alberta residents 39.4%
8,700 skier days skied elsewhere in Canada 0.5%
Southern Alberta: 95,500 skier days 5.4%
Northern Alberta: 100,700 skier days 5.7%
Edmonton and Area: 225,000 skier days 12.8%
Residents skiing Foothills and Flatland: 421,200 skier days 23.9%

Table III.1 shows that the captured portion of the market, or that portion skied in Alberta by residents and non residents, constitutes 73.8% of the total market. The escaping portion of the market, that is skiing by Alberta residents outside Alberta, constitutes 26.2% of the market. Only 10.5% of the total market (14.2% of skiing in Alberta) is skied by non residents.

ALBERTA RESIDENTS

The study estimates there were 287,800 Alberta resident skiers who skied nearly 1.6 million skier days. One half of all downhill skiing by Alberta residents takes place at Alberta Rocky Mountain destinations, a quarter is skied Out-of-Province, and Foothills and Flatland skiing accounts for the remaining quarter.

Resident Skier Days

Table III.2 shows the distribution of resident skier days by origin and destination. The table shows the propensity of the Calgary market to ski Rocky Mountain and Out-of-Province ski areas and the importance of Foothills and Flatland skiing to the Greater Edmonton, Regional, and Hinterland markets.

Resident Skier Origin

As shown in Table III.2, 1,090.9 million skier days, or nearly 70% of days skied in Alberta and Out-of-Province by Alberta residents, are generated by residents of Calgary Metro and Greater Edmonton. Further, the survey found a similar proportionate distribution in the origin of skiers.

TABLE III.2 ORIGIN AND DESTINATION OF RESIDENT SKIER DAYS
('000 Skier Days)

ORIGIN	DESTINATION				
	RMS	F&F	OOP	TOTAL	%
Calgary & Region	**386.7**	**67.8**	**224.8**	**679.3**	**43.0**
Calgary Metro	339.8	66.1	207.4	613.3	38.8
Edmonton & CMC	**231.6**	**219.6**	**150.9***	**602.1**	**38.1**
Greater Edmonton	193.1	201.7	82.8	477.6	30.2
Regional	**54.4**	**81.9**	**74.6**	**210.9**	**13.4**
Hinterland	**22.8**	**51.9**	**11.9**	**86.6**	**5.5**
TOTAL RESIDENT SKIER DAYS	**695.5**	**421.2**	**462.2**	**1,578.9**	**100.0**
Percent of Total	44.0%	26.7%	29.3%	100%	

* Includes Lethbridge: 60,000 skier days.

Table III.3 analyses the origin of all resident skiers and shows how they participate in each category of downhill skiing (RMS/F&F/OOP).

Many skiers skied at more than one ski area and experienced more than one type of destination. Therefore, total numbers of skiers are accurate by origin but duplication will exist between destination columns where skiers were active in more than one category. This overlap is also shown on Table III.1.

Table III.2 and Table III.3 show that Calgary Metro residents, with close access to the Rocky Mountain ski areas, generated twice as much Alberta Rocky Mountain skiing as did Greater Edmonton residents. The Greater Edmonton residents, however, skied nearly 50% of all Foothills and Flatland skiing.

TABLE III.3 ORIGIN AND DESTINATION OF RESIDENT SKIERS

	ORIGIN*		DESTINATION*					
			RMS		F&F		OOP	
	SKIERS ('000)	%	SKIERS ('000)	%	SKIERS ('000)	%	SKIERS ('000)	%
Calgary & Region	**109.4**	**38.0**	**84.6**	**50.9**	**12.9**	**15.0**	**27.8**	**42.1**
Calgary Metro	98.6	34.3	75.2	45.3	12.3	14.4	25.6	38.8
Edmonton & OMC	**102.9**	**35.7**	**52.2**	**31.4**	**40.2**	**46.9**	**19.9**	**30.1**
Greater Edmonton (includes Edmonton Metro)	75.2	26.1	40.6	24.4	33.9	39.6	7.9	12.0
Jasper/Hinton/ Edson	7.7	2.7	6.0	3.6	2.0	2.3	-	-
Lethbridge	11.2	3.9	0.8	0.5	0.3	0.4	10.9	16.4
Red Deer	8.8	3.0	4.8	2.9	4.0	4.6	1.1	1.7
Regional	**51.7**	**18.0**	**21.5**	**12.9**	**18.7**	**21.9**	**15.3**	**23.2**
Grande Prairie	5.6	2.0	2.1	1.2	3.5	4.1	-	-
Medicine Hat	5.2	1.8	-	-	3.5	4.0	1.8	2.7
Hinterland	**23.8**	**8.3**	**7.9**	**4.8**	**13.9**	**16.2**	**3.1**	**4.6**
TOTAL ALBERTA	**287.8**	**100.0**	**166.2**	**100.0**	**85.7**	**100.0**	**66.1**	**100.0**

* Sum of "destination" columns exceeds "origin" column: see note on page 14.

Calgary and Region

The study estimates there are 109,400 (Table III.3) active skiers in the "Calgary and Region" market area (including Metropolitan Calgary and the surrounding area plus the Calgary/Canmore corridor and Banff). Nearly 99,000 of these skiers reside in Metropolitan Calgary and form the Province's largest skier population.

Nearly 85,000 skiers, or nearly 80% of skiers from Calgary and Region skied approximately 387,000 days in the Alberta Rocky Mountain skiing market, 25% skied Out-of-Province, generating 225,000 skier days, and 12% skied nearly 68,000 days at Foothills and Flatland ski areas.

The largest proportion of skiing outside of Alberta by Calgary residents takes place in the Eastern Kootenays (88,500 skier days) followed by Montana (43,200 skier days) and then other B.C. ski areas.

Edmonton and Other Major Centres

The City of Edmonton and the surrounding area, plus Jasper/Hinton/Edson, Lethbridge, and Red Deer all fall in this market area.

Greater Edmonton

Within the Greater Edmonton area, 34,000 skiers spent a total of over 200,000 skier days in local skiing at Foothills and Flatland ski areas and 40,000 skiers skied over 190,000 days at Alberta Rocky Mountain ski areas. A further 80,000 skier days were skied by 8,000 skiers Out-of-Province, in B.C. and Montana.

Lethbridge

Lethbridge skiers are the residents most heavily oriented toward Out-of-Province skiing, with 60,000 skier days skied by 11,000 skiers and distributed almost equally between B.C. and United States destinations. This is a function of geographic location. Very little Alberta skiing is undertaken by residents of Lethbridge.

Regional and Hinterland Markets

Geographic influences are also significant in the Regional and Hinterland market areas, which accommodate most of the other major population centres in the province. The high propensity of skiers from these areas to ski local Foothills and Flatland destinations further demonstrates the importance of this type of destination for the Regional and Hinterland markets.

DESTINATION OF ALBERTA RESIDENT SKIERS

Table III.2 (previous) summarizes the destination of resident skier days, showing the distribution to Alberta Rocky Mountain, Foothills and Flatland, and Out-of-Province skiing. The following paragraphs address each type of destination.

Alberta Rocky Mountain Skiing

Table III.4 shows the relationship between origin of resident skier days and the specific Alberta Rocky Mountain ski areas.

TABLE III.4 ORIGIN AND DESTINATION OF RESIDENT, ROCKY MOUNTAIN SKIING
('000 Skier Days)

ORIGIN	DESTINATION					
	TOTAL	SUNSHINE VILLAGE	SKIING LOUISE	MOUNT NORQUAY	MARMOT BASIN	FORTRESS MOUNTAIN
Calgary & Region	**386.7**	**176.1**	**125.2**	**21.0**	**0.7**	**63.7**
Calgary Metro	339.8	169.4	101.5	10.5	0.7	57.6
Edmonton & OMC	**231.6**	**68.0**	**54.1**	**2.2**	**101.0**	**6.3**
Greater Edmonton	193.2	58.3	53.8	2.2	74.5	4.4
Jasper/Hinton/Edson	25.7	0.5	-	-	25.2	-
Lethbridge	1.5	1.5	-	-	-	-
Red Deer	11.2	7.7	0.3	-	1.3	1.9
Regional	**54.4**	**17.3**	**19.0**	**1.3**	**12.6**	**4.2**
Hinterland	**22.8**	**4.1**	**2.6**	**3.9**	**9.6**	**2.6**
TOTAL RESIDENT RMS	**695.5**	**265.5**	**200.9**	**28.4**	**123.9**	**76.8**

The Alberta Rocky Mountain ski areas collectively received 695,500 skier days, or 44% of all resident Alberta skier days. The most popular destination was Sunshine Village with 265,500 skier days (to April 30, 1984), followed by Skiing Louise at 200,900. Marmot Basin was the third favoured destination with 123,900 skier days.

Sunshine Village and Skiing Louise each received two thirds of their skier days from Calgary and Region residents while Marmot Basin received 60% of its skier days from residents of greater Edmonton and almost none from the Calgary area.

Foothills and Flatland Skiing

Table III.5 shows the origin and destination of Foothills and Flatland skier days.

TABLE III.5 ORIGIN AND DESTINATION OF FOOTHILLS AND FLATLAND SKIING
('000 Skier Days)

ORIGIN	DESTINATION			
	SOUTHERN ALBERTA	NORTHERN ALBERTA	EDMONTON & REGION	TOTAL
Calgary & Region	**67.2**	**.6**	**-**	**67.8**
Calgary Metro	65.5	.6	-	66.1
Edmonton & OMC	**2.5**	**10.4**	**206.7**	**219.6**
Greater Edmonton	1.3	10.4	190.0	201.7
Regional	**18.3**	**49.6**	**14.0**	**81.9**
Hinterland	**7.5**	**40.1**	**4.3**	**51.9**
TOTAL FOOTHILLS & FLATLAND	**95.5**	**100.7**	**225.0**	**421.2**

Skiing at Foothills and Flatland ski areas accounted for 421,200 skier days, or nearly 27% of Alberta resident skier days.

Discussions with Foothills and Flatland ski area operators suggest as many as 30% of their skiers, and in some cases as many as 50%, are under 13 years of age.

Foothills and Flatland ski areas are used as local ski areas where, generally, little travel distance and lower cost are involved. This is particularly noticeable in Edmonton and Region where local ski areas captured 225,000 skier days, or over half of all Foothills and Flatland skier days.

Out-of-Province

Table III.6 shows the origin and destination of resident, Out-of-Province skier days.

TABLE III.6 ORIGIN AND DESTINATION OF RESIDENT, OUT-OF-PROVINCE SKIING
('000 Skier Days)

ORIGIN	DESTINATION					
	TOTAL B.C.	EASTERN KOOTENAYS	TOTAL U.S.	MONTANA	OTHER CANADA	GRAND TOTAL
Calgary & Region	**141.3**	**88.5**	**83.5**	**43.2**	**-**	**224.8**
Metro Calgary	131.6	85.9	75.8	41.3	-	207.4
Edmonton & OMC	**89.9**	**50.7**	**56.0**	**31.9**	**5.0**	**150.9**
Greater Edmonton	57.3	20.1	20.5	8.9	5.0	82.8
Lethbridge	29.2	29.2	30.1	23.1	-	59.3
Regional	**39.8**	**34.9**	**34.8**	**23.9**	**-**	**74.6**
Hinterland	**8.2**	**-**	**-**	**-**	**3.7**	**11.9**
TOTAL RESIDENT OUT-OF-PROVINCE	**279.2**	**174.1**	**174.3**	**99.0**	**8.7**	**462.2**

Nearly 30% of Alberta originating skier days were lost to destinations outside Alberta. This amount is equivalent to about two thirds of the Rocky Mountain skiing by residents in Alberta and is larger than the Foothills and Flatland market.

The most popular destinations for Alberta residents skiing Out-of-Province are the Eastern Kootenays of British Columbia, and

Montana, which received 11% and 6% of total Alberta resident skier days respectively.

NON RESIDENTS

Table III.7 shows the origin and destination of non resident skiers and skier days.

TABLE III.7 ORIGIN AND DESTINATION OF NON RESIDENTS SKIING ALBERTA RMS

	ORIGIN				DESTINATION ('000 Skier Days)			
	SKIERS ('000)	%	SKIER DAYS ('000)	%	SUNSH. VILL.	SKIING LOUISE	MOUNT NORQ.	MARMOT BASIN
Canada	**22.5**	**75.0**	**125.6**	**68.0**	**57.6**	**52.8**	**2.7**	**12.5**
Ontario	6.6	22.0	43.8	23.7	17.6	22.9	1.0	2.3
Saskatchewan	6.5	21.7	26.4	14.3	14.1	7.6	0.2	4.5
B.C.	4.2	14.0	20.5	11.1	8.3	8.5	0.6	3.1
Manitoba	2.9	9.7	17.7	9.6	9.5	6.5	0.7	1.0
Quebec	1.6	5.3	12.1	6.5	7.0	4.1	0.2	0.8
Other Canada	0.7	2.3	5.1	2.8	1.1	3.2	-	0.8
United States	**5.5**	**18.3**	**39.5**	**21.4**	**21.3**	**14.9**	**1.4**	**1.9**
Texas	1.2	4.0	9.7	5.3	4.1	3.6	0.6	1.4
California	1.3	4.3	8.0	4.3	5.2	2.4	0.3	0.1
Other U.S.	3.0	10.0	21.8	11.8	12.0	8.9	0.5	0.4
Other Foreign	**2.0**	**6.7**	**19.7**	**10.6**	**10.6**	**7.7**	**0.5**	**0.9**
TOTAL NON RES.	**30.0**	**100.0**	**184.8**	**100.0**	**89.5**	**75.4**	**4.6**	**15.3**
PERCENT OF TOTAL NON RESIDENT					48.4	40.8	2.5	8.3

Within this study non residents were surveyed at Sunshine Village, Skiing Louise, Mount Norquay, and Marmot Basin. At these ski areas 30,000 non resident skiers generated 184,800 skier days. Two thirds of non residents skiing in Alberta were from other Canadian provinces and a further 20% were residents of the United States.

ORIGIN OF NON RESIDENTS

Table III.7 shows the significance of the Canadian market among non residents. Five Canadian provinces each generated more non resident skier days in Alberta than originated in any state in the United States or in any other country.

The United States was the origin of the largest number of foreign skier days.

Australia and the United Kingdom were the most prominent foreign countries outside the United States.

Japanese skiers projected in the study accounted for less than 1% of non resident skier days. However, language barriers would have caused some under-counting in the survey with respect to non English speaking skiers.

Canadian Residents

Approximately 22,500 Canadian residents who are not residents of Alberta, skied at Alberta's Rocky Mountain ski areas, forming 75% of the non resident market. They skied 125,600 days, or over two thirds of the total non resident skier days estimated in the survey. Ontario residents alone constituted nearly a quarter of the total supply of non resident skier days. Skiers from Ontario, Saskatchewan, and British Columbia together skied almost 50% of the total number of skier days captured in the non resident market.

Non residents from Canada skied over three times as many days in Alberta as did United States residents.

United States Residents

Table III.7 shows that 5,500 United States residents, forming 18% of the non resident market, skied 39,500 days or 21% of total non resident skier days estimated at the four Alberta Rocky Mountain ski areas surveyed. Residents of Texas and California skied 45% of skier days originating in the United States.

Although slightly fewer residents of Texas than of California (1,200 vs 1,300) skied Alberta Rocky Mountain destinations, the Texas residents generated the larger number of skier days at 9,700, or over 5% of non resident skier days. Residents of California skied a total of 8,000 skier days.

Duration of Trip

Non resident skiers from Canada and the United States skied an average of 6 days per skier. As the distance travelled to Alberta increased, the number of days skied generally also increased. Skiers from Texas skied an average of over 8 days; those from Saskatchewan and British Columbia about 4 days.

DESTINATION OF NON RESIDENTS

As indicated in Table III.7, the largest number of non resident skier days was skied at Sunshine Village, followed closely by Skiing Louise. Marmot Basin ranked third.

Sunshine Village and Skiing Louise

With the exception of skier days originating in Ontario and British Columbia, Sunshine Village received more skier days from each of the origin provinces and states shown in Table III.7 than any other Alberta ski area. In most cases non residents skied significantly more days at Sunshine Village than at Skiing Louise.

British Columbia skiers skied a very similar number of days at each of Skiing Louise and Sunshine Village.

Ontario residents preferred Skiing Louise, allocating over 50% of their Alberta skier days to this ski area.

Mount Norquay

Mount Norquay received 2.5% of the total non resident skier days. Most of these originated in Canada.

Marmot Basin

Marmot Basin received nearly 10% of all Canadian non resident skier days but only 4% of those originating in the United States. Over one third of Marmot Basin's Canadian, non resident skier days originated in Saskatchewan.

IV. SKIER EXPENDITURE

TOTAL MARKET EXPENDITURE

The study examined expenditure related to downhill skiing by resident and non resident skiers in Alberta and by resident skiers outside the province. Total expenditure was found to be $115.1 million on skiing activities and a further $41.3 million on ski clothing and equipment.

Data were analysed for skiers using tour packages and for those who were not. With the exception of resident, Out-of-Province skiers, three types of expenditure were recorded:

- Direct (not on package)
- Direct (while on package)
- Package costs

All direct costs are combined for residents skiing Out-of-Province.

SKIING EXPENDITURE

Table IV.1 shows the analysis of total expenditure on skiing. Chart IV.i provides a profile of the expenditure.

Total skiing expenditure accounted for $115.1 million, including $61.8 million by residents and $21.3 million by non residents in Alberta, and a further $32.0 million by residents skiing outside Alberta.

TABLE IV.1 TOTAL MARKET EXPENDITURE

EXPENDITURE	'000 SKIER DAYS	AVERAGE EXP/DAY $	PKG. FACTOR (*1)	TOTAL $'000
TOTAL INFLOWS				
Direct Exp. in Alberta				
Resident, N.P. (*2)	963.7	54.11	-	52,146
Resident, P. (*3)	153.0	24.33	-	3,723
Non Resident, N.P.	134.7	117.48	-	15,825
Non Resident, P.	50.1	58.05	-	2,908
Total Direct				74,602
Package Exp. in Alberta (*4)				
Resident in Alberta	153.0	35.33	1.0	5,406
Non Resident in Alta.	50.1	87.80	0.6	2,639
Resident, Out-of-Prov.	123.4	41.98	0.1	518
Total Package				8,563
Total Inflows				**83,165**
TOTAL OUTFLOWS				
Resident, Out-of-Pocket (*5)	462.2	58.99	-	27,265
Resident, Package Exp.	123.4	41.98	0.9	4,662
Total Outflows				**31,927**
TOTAL MARKET EXPENDITURE				**$115,092**

*1 Package Factor: Percentage of Tour Cost Package Accruing to Alberta

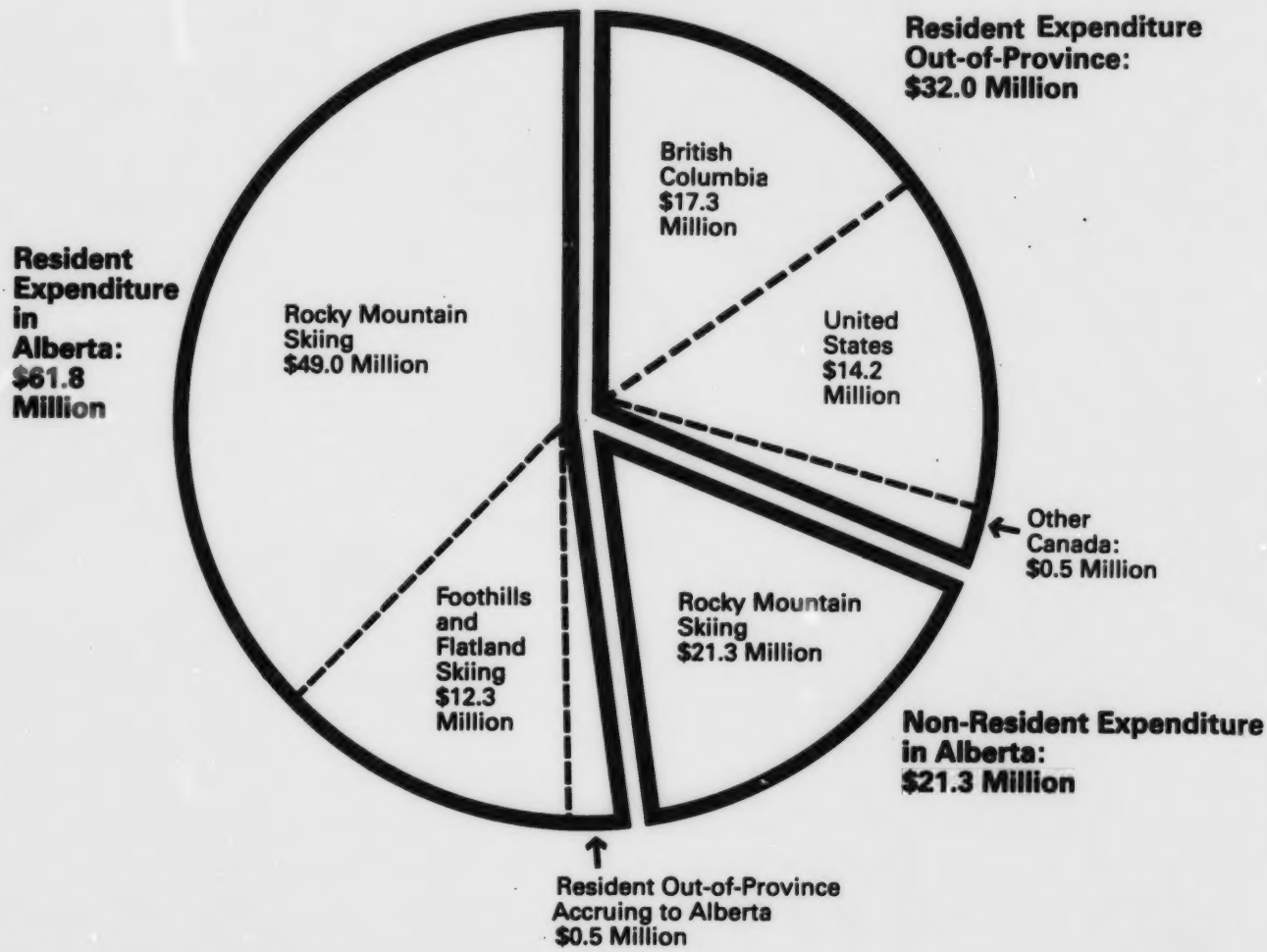
*2 N.P.: Direct Expenditure of Skiers not Skiing Through a Tour Package

*3 P.: Direct Expenditure of Skiers while Skiing Through a Tour Package

*4 Package Expenditure: Cost of Tour Package

*5 Includes all direct expenditures by residents, Out-of-Province whether on package tour or not

Chart IV.i **Total Market Expenditure: $115.1 Million**


Resident Expenditure Out-of-Province: $32.0 Million
British Columbia $17.3 Million
United States $14.2 Million
Other Canada: $0.5 Million
Resident Expenditure in Alberta: $61.8 Million
Rocky Mountain Skiing $49.0 Million
Foothills and Flatland Skiing $12.3 Million
Rocky Mountain Skiing $21.3 Million
Non-Resident Expenditure in Alberta: $21.3 Million
Resident Out-of-Province Accruing to Alberta $0.5 Million

RESIDENT SKIERS

The origin and destination of resident skiing expenditure is shown in Table IV.2. Resident skiers spent $93.8 million on skiing, two thirds of which took place in Alberta.

TABLE IV.2 ORIGIN AND DESTINATION OF RESIDENT SKIERS' EXPENDITURE

ORIGIN

	CAL.& REG.	CAL. METRO	EDM.& OMC.	GTR. EDM.	REG.	HIN.	TOTAL
Skier Days ('000)	679.3	613.3	602.1	477.6	210.9	86.6	1,578.9
Expenditure ($ Million)							
Skiing In Alberta	20.2	18.3	30.1	27.9	6.4	4.6	61.3
Out-of-Province Exp.	15.5	14.4	9.4	5.9	5.2	1.9	32.0
Out-of-Province Alberta Expenditure	0.3	0.3	0.1	0.1	0.1	-	0.5
TOTAL RESIDENT EXP.	36.0	33.0	39.6	33.9	11.7	6.5	93.8

DESTINATION

Rocky Mountain Skiing	$49.0 Million
Foothills and Flatland	$12.3 Million
Out-of-Province	$32.0 Million
Out-of-Province Accruing to Alberta	$ 0.5 Million
TOTAL RESIDENT EXPENDITURE	**$93.8 Million**

Alberta Skiing

Resident skiers spent $49.0 million, or 80% of their Alberta expenditure on Rocky Mountain Skiing. A further $12.3 million was spent skiing at Foothills and Flatland destinations. A small proportion of the total expenditure, $0.5 million accrued to Alberta associated with residents skiing Out-of-Province.

Origin

The origin of resident expenditure on downhill skiing is shown in Chart IV.ii. Skiers from the Calgary and Region market area spent $20.5 million, 90% of which originated in Calgary Metro, and accounted for nearly one third of skiing expenditure in Alberta. Residents of the Edmonton and Other Major Centres market area spent $30.2 million, or nearly half of the resident, Alberta total. Over 45% of the resident, Alberta volume, or $28.0 million, originated in Greater Edmonton. The Regional Market area accounted for $6.5 million, or 10%, and the Hinterland Market $4.6 million, or 8% of the total expenditure by residents in Alberta.

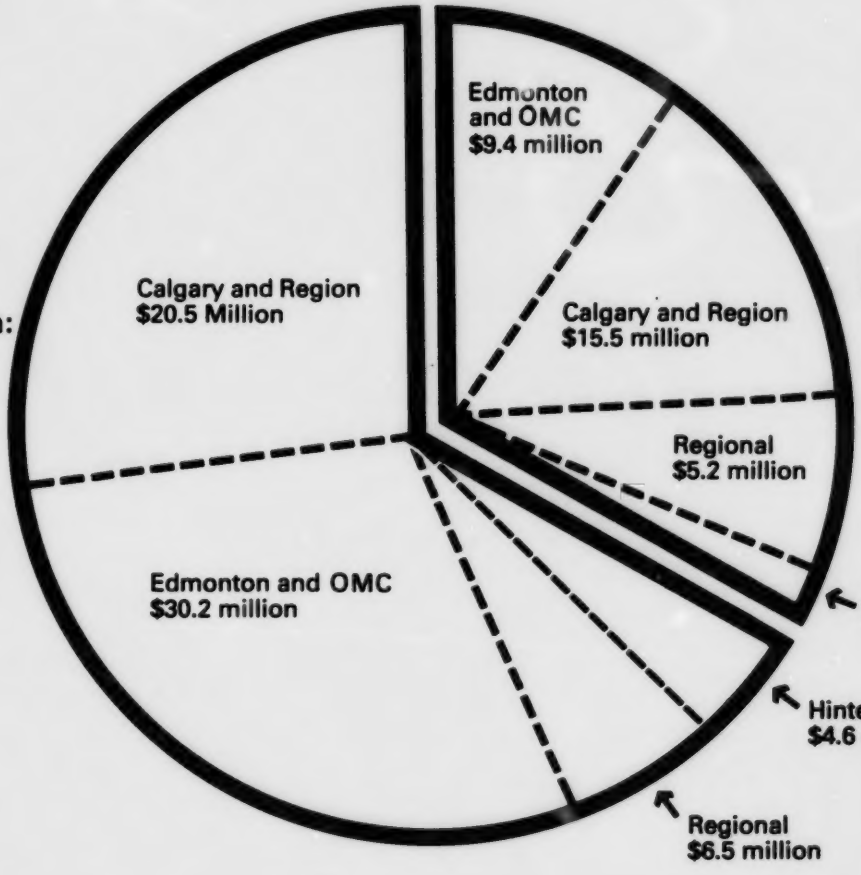
Destination

The distribution of resident expenditure by Alberta destination is shown in Table IV.3.

TABLE IV.3 DISTRIBUTION OF RESIDENT SKIING EXPENDITURE BY ALBERTA DESTINATION
($ Million)

DESTINATION (based on skier days)	EXPENDITURE
Banff/Lake Louise Area	33.0
Fortress Mountain	4.0
Marmot Basin	12.0
Total Resident, Rocky Mountain	49.0
Foothills and Flatland	12.3
Out-of-Province Accruing to Alberta	0.5
TOTAL RESIDENT EXPENDITURE IN ALBERTA	61.8

Chart IV.ii **Origin of Resident Expenditure**


Edmonton and OMC $9.4 million
Escaping Market: $32.0 million
Calgary and Region $15.5 million
Regional $5.2 million
Hinterland $1.9 million
Hinterland $4.6 million
Regional $6.5 million
Calgary and Region $20.5 Million
Skiing in Alberta: $61.8 million*
Edmonton and OMC $30.2 million

*includes portion of Out-of-Province expenditure accruing to Alberta

Out-Of-Province Skiing

Out-of-Province expenditure by residents accounted for $32.0 million, or one third of all skiing expenditure by residents. Additionally, $0.5 million that accrued to Alberta was spent by residents on Alberta costs associated with Out-of-Province skiing packages. Table IV.2 shows the distribution of resident expenditure on skiing.

Origin

Residents of Calgary and Region spent $15.5 million Out-of-Province on skiing, or nearly 50% of total Out-of-Province expenditure by residents. Calgary Metro residents spent $14.4 million.

The Edmonton and Other Major Centres market area accounted for $9.4 million, or some 30% of resident, Out-of-Province expenditure. Within this market area, residents of Greater Edmonton accounted for $5.9 million.

Lethbridge residents generated 60,000 skier days or 13% of all resident Out-of-Province skiing, a volume which is second only to Calgary Metro (Table III.2, page 14). Out-of-Province skiing by residents of Lethbridge is estimated to account for approximately $3.3 million, or 36%, of the total expenditure by the Edmonton and Other Major Centres market area.

The Regional and Hinterland market area residents spent a total of $7.1 million outside Alberta.

Destination

Almost all Out-of-Province expenditure by residents accrued to British Columbia and the United States. Chart IV.i shows that $17.3 million, or 54% of Out-of-Province expenditure, was related

to skiing in British Columbia and $14.2 million to skiing in the United States.

Table IV.4 shows that the Eastern Kootenays and Montana destinations accrued revenue from Alberta skiers at $10.1 million and $8.2 million respectively.

TABLE IV.4 OUT-OF-PROVINCE EXPENDITURE BY RESIDENT SKIERS

DESTINATION	DAILY AVERAGE ($)	TOTAL ($ Million)
British Columbia	**62.68**	**17.3**
Eastern Kootenays	58.01	10.1
United States	**82.62**	**14.2**
Montana	82.83	8.2
Other Canada	**68.97**	**0.5**
TOTAL OUT-OF-PROVINCE EXPENDITURE		**32.0**

Average daily expenditure related to skiing at United States destinations, particularly Montana, was higher per skier day than it was for British Columbia destinations.

NON RESIDENTS

Expenditure by non residents accruing to Alberta was estimated to be $21.3 million, or 19% of the total expenditure in the marketplace. Table IV.5 shows the origin and destination of skiers making this expenditure.

This table shows that nearly $14 million was spent by residents of Canada (other than Alberta), contributing nearly two thirds of the total Alberta skiing expenditure by non residents. Ontario skiers, spending over $5 million, generated 25% of the Alberta destined expenditure in the non resident market, exceeding expenditure accruing to Alberta by all United States residents.

TABLE IV.5 EXPENDITURE BY NON RESIDENTS ACCRUING TO ALBERTA[1]
($ Million)

ORIGIN	EXPENDITURE
Canada:	**13.6**
Ontario	5.2
Saskatchewan	2.8
British Columbia	1.7
Manitoba	1.8
Quebec	1.4
Other	0.7
United States:	**4.7**
California	0.9
Texas	1.0
Other	2.8
Other Foreign	**3.0**
TOTAL NON RESIDENT EXPENDITURE	**21.3**

DESTINATION	EXPENDITURE
Banff/Lake Louise Area [2]	19.3
Marmot Basin	2.0
TOTAL NON RESIDENT EXPENDITURE	**21.3**

1 It is estimated that all of direct expenditure in Alberta and 60% of tour package expenses accrue to Alberta.
2 Includes Sunshine Village, Skiing Louise, and Mount Norquay.

INFLOWS TO AND OUTFLOWS FROM ALBERTA

Alberta retains $83.2 million, or 72% of expenditure in the Alberta ski market, as is shown in Table IV.1.

Further analysis of expenditure data relative to the evaluation of inflows and outflows is provided in Table IV.6. Overall expenditure per skier day is shown to be similar for residents skiing at Rocky Mountain ski areas in Alberta or skiing Out-of-Province ($70). This is likely a function of pricing strategies and distance travelled to ski. Most residents skiing Out-of-

Province are residents of Calgary or Lethbridge and are located as close to their destination as most residents of the Edmonton and Other Major Centres market area are to the Alberta Rocky Mountain destinations.

TABLE IV.6 ANALYSIS OF MARKET EXPENDITURE

ORIGIN	SKIER DAYS ('000)	%	$ PER SKIER DAY	EXPENDITURE $ Million	%
Residents in Alberta RMS	695.5	39.4	70	49.0	42.6
F&F	421.2	23.9	29	12.3	10.7
Non Residents	184.8	10.5	115	21.3	18.5
Residents Out-of-Province	462.2	26.2	70	32.5*	28.2
TOTAL	**1,763.7**	**100.0**		**115.1**	**100.0**

* includes expenditure accruing to Alberta plus that accruing elsewhere

The relationships between percentage of skier days and percentage of expenditure are very similar for the resident, Rocky Mountain and resident, Out-of-Province categories. The non resident expenditure at $115 per skier day is significantly higher than for any other category. This expenditure accounts for 19% of total expenditure, although it results from only 11% of the skier days in the market.

The value of the skiing market to Alberta is significantly diluted due to the expenditure of residents outside the province. The balance between the expenditure of non residents accruing to Alberta, and the expenditure of residents outside the province results in a net outflow of skiing dollars. Residents spent $1.50 outside the province for every $1.00 spent in Alberta by non residents, which amounted to a net outflow of $10.7 million during the season.

Resident, Out-of-Province Expenditure:	$32.0 million
Non Resident Expenditure accruing to Alberta:	$21.3 million
NET OUTFLOW	**$10.7 million**

The magnitude of this outflow of funds available to the Alberta skiing related industries can be demonstrated by considering that the number of dollars lost could be made up by one of the following strategies:

- increasing non resident skiing in Alberta by 50%
- converting 33% of resident, Out-of-Province skiing to Alberta Rocky Mountain skiing
- generating 23% more resident Rocky Mountain skiing (although not at the expense of Foothills and Flatland skiing)
- generating 85% more Foothills and Flatland skiing (although not at the expense of resident Rocky Mountain skiing)

Canadian, non residents spent $13.6 million in Alberta ($1.7 million from B.C.), and Alberta residents spent nearly $18.0 million in Canada, outside Alberta ($17.3 million in British Columbia). Residents of the United States spent $4.7 million in Alberta and Alberta residents spent $14.2 million in the United States.

EXPENDITURE PATTERNS OF RESIDENT SKIERS

Table IV.7 identifies, by expenditure category, average daily expenditure for residents who skied at Alberta Rocky Mountain, Foothills and Flatland, and Out-of-Province destinations.

Average data are shown for direct expenditure by skiers who had purchased tour packages and for those who had not.

TABLE IV.7 AVERAGE DAILY DIRECT EXPENDITURE BY RESIDENTS AT ROCKY MOUNTAIN, FOOTHILL AND FLATLAND, AND OUT-OF-PROVINCE SKI AREAS
($ Average)

EXPENDITURES CATEGORY	DESTINATION		
	RMS	F&F	OOP
Meals & Refreshments:			
Direct Expenditure (not on tour package)	19.75	4.61	
Direct Expenditure (while on tour package)	17.65	5.50	
Total Direct Expenditure			17.19
Accommodation:			
Direct Expenditure (not on tour package)	10.89	0.23	
Direct Expenditure (while on tour package)	.66	.29	
Total Direct Expenditure			9.75
Car:			
Direct Expenditure (not on tour package)	13.21	7.18	
Direct Expenditure (while on tour package)	1.93	0.75	
Total Direct Expenditure			12.52
Other Transportation:			
Direct Expenditure (not on tour package)	.03	-	
Direct Expenditure (while on tour package)	.02	-	
Total Direct Expenditure			.20
Ski Equipment & Clothing:			
Direct Expenditure (not on tour package)	1.36	1.50	
Direct Expenditure (while on tour package)	1.38	1.78	
Total Direct Expenditure			1.64
Lift Tickets:			
Direct Expenditure (not on tour package)	17.58	9.30	
Direct Expenditure (while on tour package)	1.46	1.79	
Total Direct Expenditure			10.79
Ski Equipment & Rental:			
Direct Expenditure (not on tour package)	2.09	4.53	
Direct Expenditure (while on tour package)	3.35	2.41	
Total Direct Expenditure			2.33
Ski School Lessons:			
Direct Expenditure (not on tour package)	.30	.57	
Direct Expenditure (while on tour package)	.16	.00	
Total Direct Expenditure			.14
Recreation/Entertainment:			
Direct Expenditure (not on tour package)	5.64	1.33	
Direct Expenditure (while on tour package)	4.24	1.74	
Total Direct Expenditure			6.68
Other Expenses:			
Direct Expenditure (not on tour package)	.55	-	
Direct Expenditure (while on tour package)	.70	-	
Total Direct Expenditure			.58

Package costs typically include a number of the items reported in the expenditure categories. Table IV.7 shows that direct expenditure by skiers who were not on packages was significantly higher for accommodation, automobile expenses, and lift tickets. Table IV.8 shows that resident skiers on tour packages spent more per day than those not travelling on tour packages. Only 14% of resident Rocky Mountain, 13% of Foothills and Flatland, and 28% of resident Out-of-Province skiers were on tour packages.

TABLE IV.8 DAILY EXPENDITURE BY RESIDENTS IN ALBERTA, PACKAGE VS. NON PACKAGE
($ Average)

	RMS	F&F
TOTAL EXPENDITURE BY SKIERS NOT ON PACKAGE	**67.25**	**26.29**
Package Cost	41.90	23.97
Additional Direct Expenditure By Skiers On Packages	30.04	14.12
TOTAL PACKAGE AND RELATED COSTS	**71.94**	**38.09**

Accommodation expenses were significantly less for Foothills and Flatland skiers than for others because most Foothills and Flatland skiers did not stay overnight. This also accounts for the lower expenditure on meals and recreation/entertainment. Most resident skiers at Foothills and Flatland ski areas travelled by automobile. Therefore, shorter distances to the ski area resulted in lower car expenses for Foothills and Flatland skiers. Lift tickets typically cost less at Foothills and Flatland ski areas, but additionally, it is likely a smaller proportion of skiers skied (and, therefore, paid for) full days at Foothills and Flatland destinations than at Rocky Mountain destinations.

On the other hand, the higher expenditure by Foothills and Flatland skiers on Ski Equipment Rentals and Ski School Lessons

suggests that less experienced skiers use the Foothills and Flatland ski areas rather than the Rocky Mountain areas, as noted in Section VI.

EXPENDITURE ON SKI CLOTHING AND EQUIPMENT

Table IV.9 shows the analysis of average and total resident skier expenditure on ski clothing and equipment, by origin of skier. Additionally, average expenditure by destination is included. Duplication will exist in extending average data based on destination where skiers skied at more than one type of destination (RMS and F&F; F&F and OOP, etc).

TABLE IV.9 RESIDENT EXPENDITURE FOR SKI CLOTHING AND EQUIPMENT

	SKI CLOTHING		SKI EQUIPMENT	
	AVG./SKIER $	TOTAL ($ million)	AVG./SKIER $	TOTAL ($ million)
ORIGIN OF RESIDENTS				
Calgary & Region	**58.02**	**6.3**	**91.19**	**10.0**
Calgary Metro	54.94	5.4	66.04	6.5
Edmonton & OMC	**69.66**	**7.2**	**82.59**	**8.5**
Greater Edmonton	67.18	5.1	92.74	7.0
Regional	**68.44**	**3.5**	**73.70**	**3.8**
Hinterland	**50.58**	**1.2**	**34.93**	**.8**
TOTAL RESIDENT EXPENDITURE	**63.37**	**18.2**	**80.24**	**23.1**
DESTINATION OF RESIDENTS				
Rocky Mountain Ski Areas	69.35	11.5	88.65	14.7
Foothills and Flatland	59.59	5.1	84.34	7.2
Out-of-Province	71.19	4.7	83.50	5.5
Overlap		(3.1)		(4.3)
TOTAL RESIDENT EXPENDITURE	**63.37**	**18.2**	**80.24**	**23.1**

The survey estimates a total of $41.3 million was spent in this category; $18.2 million on ski clothing and $23.1 million on ski equipment.

The survey analysed skier expenditure on ski clothing and equipment during the survey period only. The questionnaire asked for expenditure amounts "since the start of this season". Therefore, the data provided in this report are based only on the responses of skiers interviewed in the spring period. Only those skiers would have had the opportunity to make purchases during the whole season. Additionally, many skiers purchase clothing and equipment during off-season sales and it is not likely that this expenditure will have been recorded.

V. SKIER BEHAVIOR

Skier behavior includes the study of population participation in skiing and skier travel modes.

PARTICIPATION

Table V.1 shows the percentage of the Alberta population in each market area participating in skiing. These data result from a household-based methodology.

TABLE V.1 RESIDENT PARTICIPATION RATES IN SKIING
(Percent of Population)

ORIGIN	OVERALL	PARTICIPATION RATE RMS	F & F	OUT-OF-PROV.
ALBERTA				
Calgary & Region	18.2	13.6	2.1	4.5
Edmonton & Other Major Centres	12.9	6.3	4.8	2.4
Regional Market	11.8	4.8	4.1	3.4
Hinterland	13.2	6.0	10.3	2.3
TOTAL ALBERTA	**14.2**	**8.1**	**4.1**	**3.2**

The table shows that the population of Calgary and Region, at 18.2%, contained the highest proportion of skiers among the market areas. The trend held for Rocky Mountain and Out-of-Province skiing by the Calgary and Region population, but this population contained the smallest proportion of Foothills and Flatland skiers. The Hinterland population, located more conveniently to Foothills and Flatland destinations, contained the greatest proportion of Foothills and Flatland skiers.

FREQUENCY

Table V.2 shows the number of days skied per skier (total days ÷ total skiers), the frequency of trips (total days ÷ days claimed

for last trip) and average trip duration (average days ÷ average days per trip).

TABLE V.2 SKIING FREQUENCY AND TRIP DURATION

ORIGIN	SKIER DAYS PER SKIER (days/skier)	FREQUENCY OF TRIPS (trips/season)	AVERAGE TRIP DURATION (days)
RESIDENTS			
Calgary & Region	6.2	1.9	3.2
Calgary Metro	6.2	1.9	3.2
Edmonton & OMC	5.9	1.7	3.4
Greater Edmonton	6.4	1.8	3.6
Regional Market	4.1	1.6	2.5
Hinterland	3.6	1.6	2.3
TOTAL RESIDENTS	**5.5**	**1.8**	**3.1**
NON RESIDENTS			
Canadian	5.6	-	-
U.S.	7.2	-	-
Other	9.9	-	-
TOTAL NON RESIDENTS *	**6.2**	-	-

* Data collected for only one ski trip to Alberta.

RESIDENTS

Skiers from Calgary and Region, and Calgary Metro, skied more frequently than other skiers at 1.9 trips during the season. Their average trip duration, at 3.2 days, was shorter than trips made by residents of Edmonton and Other Major Centres, and Greater Edmonton. The average trip duration of Calgary skiers is a combination of short Rocky Mountain trips in Alberta and longer Out-of-Province trips.

With their longer average trip duration (3.6 days/trip) and frequency of 1.8 trips during the season, residents of Greater

Edmonton skied, on average, more days during the season than skiers from other market areas. The average trip duration of skiers from Greater Edmonton combines the shorter Foothills and Flatland trips and longer Rocky Mountain ski trips.

MODE OF TRANSPORTATION

Table V.3 shows the mode of transportation used by skiers to reach each type of destination. The percentages shown are based on data from the last trip.

TABLE V.3 **MODE OF TRANSPORTATION**
(Percent of Skiers)

MODE	CAPTURED R M S RES.	CAPTURED R M S NON RES.	FOOTHILLS & FLATLAND	ESCAPING OUT-OF-PROVINCE	TOTAL
Private Car	83.7	49.0	80.7	68.7	77.0
Air	-	56.9	-	6.6	6.5
Chartered Bus	10.6	6.6	14.4	23.2	13.4
Scheduled Bus	3.9	10.9	4.7	.6	4.2
Rental Car	-	16.0	.4	-	1.6
Train	.5	4.7	-	-	.7
Taxi	.5	1.9	-	-	.4
Other/don't know	1.3	.3	.4	3.9	1.5
Multi Mode, Overlap	(.5)	(46.3)	(.6)	(3.0)	(5.3)
TOTAL SKIERS	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

RESIDENTS

Most residents travelled to the ski area by private car regardless of place of residence in Alberta.

Chartered bus was the second most common mode of transportation. This mode was most popular for the resident Out-of-Province skiers and was most prevalent among skiers destined for Montana (35.7%).

Greater Edmonton (14.5%) and Calgary Metro (13.9%) residents used chartered bus to a similar extent.

NON RESIDENTS

The largest proportions of skiers from Saskatchewan (85%), B.C. (64%), and Manitoba (52%) used private automobile for their trip to Alberta. Most other non residents travelled by air and/or bus and many (16% of non residents) rented automobiles.

TRIP TIMING

Approximately 56% of resident skier days are termed "weekday". This trend is maintained through all market areas, with the exception of Greater Edmonton, where only 46% of skier days were weekdays. Weekday skiing is day skiing on Mondays to Fridays, or days on trips involving two or more weekdays and one or more weekend days.

ACCOMMODATION

Table V.4 shows the type of accommodation used by skiers during their trip and is based on data from the last ski trip taken.

RESIDENTS

Most residents skiing Rocky Mountain or Foothills and Flatland did not stay overnight. Approximately 55% of resident Rocky Mountain and 95% of Foothills and Flatland skiing consists of day trips.

TABLE V.4 **TYPE OF ACCOMMODATION**
(Percent of Skiers)

ACCOMMODATION	CAPTURED R M S RES.	CAPTURED R M S NON RES.	CAPTURED FOOTHILLS & FLATLAND	ESCAPING OUT-OF-PROVINCE	TOTAL
Hotel, motel, lodge	31.8	72.9	1.0	47.4	31.2
Friends & relatives	7.2	21.6	3.2	10.4	8.1
Own cottage/condo	.8	1.3	.7	7.0	1.9
Campsite	2.4	.6	.4	-	1.3
Guest house/hostel	1.3	2.9	-	.6	1.0
Did not stay over	55.0	7.0	94.7	32.7	55.9
Other/don't know	1.5	.7	-	1.9	1.1
Overlap	-	(7.0)	-	-	(.5)
TOTAL SKIERS	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

The largest proportion of residents who stayed overnight on their trip used a hotel, motel or lodge (31.8% of skiers skiing Rocky Mountain destinations and 47.4% of those skiing Out-of-Province).

Most one day skiing was by residents of Calgary Metro (69%). Skiers from Greater Edmonton (41%), the Regional market (35.4%), and the Hinterland market (25.6%) were all more likely than skiers from Calgary Metro (18.5%) to use hotel/motel/lodge style of accommodation.

The use of accommodation owned by the skier or by friends and relatives was found to be fairly equally represented among the various originating market areas (Calgary Metro, 10%; Greater Edmonton, 10.5%; Regional, 4.1%; Hinterland, 6.9%).

Residents skiing Out-of-Province were more likely than other residents to use accommodation owned by friends and had a significantly greater propensity to stay at their own cottage or condominium at their destination.

NON RESIDENTS

Non residents typically used hotel/motel/lodge accommodation (72.9%) or stayed at accommodation owned by friends and relatives (21.6%). The overlap suggests that some non residents stayed in a hotel, motel, or lodge prior to, or after leaving, other accommodation.

TOUR PACKAGES

Table V.5 shows that only approximately 20% of skier days resulted from tour packages. The table also shows the category of organizer of tours used by residents and non residents, by type of destination. Tour packages are any packages combining two or more of the major cost elements of the trip.

TABLE V.5 USE OF TOUR PACKAGES
(Percent of Skier Days)

	CAPTURED			ESCAPING	
	R M S		FOOTHILLS	OUT-OF-	
USE OF TOUR PACKAGES	RES.	NON RES.	& FLATLAND	PROVINCE	TOTAL
Not on tour package	86.0	72.9	87.2	73.3	80.5
On tour package	14.0	27.1	12.8	26.7	19.5
TOTAL SKIER DAYS	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**
ORGANIZER OF TOUR PACKAGE					
School/community	44.5	2.4	62.4	30.7	-
Wholesaler/travel agency/airline	18.1	67.4	9.6	18.0	-
Ski club	4.2	-	6.2	15.7	-
Ski hill	11.5	22.8*	13.0	10.8	-
Private charter	4.6	-	3.5	7.0	-
Hotel	-	3.8	-	-	-
Other/don't know	17.1	3.6	5.3	17.8	-
TOTAL TOUR PACKAGE SKIER DAYS	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

* Includes Banff Club Ski, 15.1%

USE OF TOUR PACKAGES

Over 80% of skier days were not associated with tour packages.

Resident skiers were more likely to be on tour packages when skiing Out-of-Province (26.7%) than when skiing at Rocky Mountain (14%), or Foothills and Flatland (12.8%) ski areas. Approximately 27% of all non residents skiing in Alberta were on tour packages.

ORGANIZER OF TOUR PACKAGES

School and community group tours were the most prominent source of tour packages among residents. It is possible these tours were arranged through wholesalers/travel agencies/airlines, or ski hills.

Wholesalers, travel agencies, or airlines formed the largest source of tours for non residents (67.4%), and the second largest source for residents skiing at Alberta's Rocky Mountain (18.1%) and Out-of-Province (18.0%) ski areas.

Tours arranged by ski hills were the source of 13% of Foothills and Flatland tour packages. These tours often included lift tickets and bus transportation from nearby downtown locations. The large proportion of tours to Foothills and Flatland destinations arranged by school/community groups is likely associated with skiing in the curriculum at schools.

VI. SKIER PROFILE

The study surveyed a wide range of profile data for resident and non resident skiers. Two composite variables, "Lifestage" and "Socio Economic Status", plus age, sex and skill are addressed in this report. The two composite categories are defined in Appendix 1.

LIFESTAGE

The study profiled the lifestage of skiers. Lifestage describes the household environment of the skier by combining the variables of household size, age of the youngest person in the household, and age of the chief wage-earner.

There is a marked prevalence of members of "middle families" (that is, those with children over 6 years of age) among resident skiers, followed by "young couples and co-op units", then "older families" (parents over 45 years of age, with children). Non residents were most likely to be members of "young couples/co-op units" or to be "young bachelors".

RESIDENTS

Table VI.1 shows the lifestage of resident skier households.

Over 30% of resident skiers were categorized "young bachelors" or "young couples/co-op units". As young families are developing, less skiing takes place. By the time the family reaches "middle" stage, skiing activity increases again. It begins to fall off as families grow.

In the Calgary and Region market area, nearly 40 % of skiers are categorized "young bachelors" or "young couples/co-op units". "Middle families" constitute 24% and "older families" 14% of

skier backgrounds. A similar trend exists from the Edmonton and Other Major Centres market area although there were significantly smaller proportions of "young bachelors" and "young couples/co-op units", and significantly larger proportions of "middle" and "older" families.

TABLE VI.1 LIFESTAGE OF RESIDENT SKIERS
(Percent of Skiers)

	RESIDENT ORIGIN				
LIFESTAGE	CALGARY & REGION	EDMONTON & OMC	REGIONAL MARKET	HINTER-LAND	TOTAL
Young Bachelors	12.1	6.4	4.4	10.2	8.5
Young Couples/ Co-op Units	27.1	21.5	16.3	16.5	22.3
Young Families	8.2	10.8	11.2	21.3	10.7
Middle Families	24.2	31.9	34.0	23.4	28.7
Older Families	13.6	19.2	25.2	21.6	18.3
Grown Families	4.8	6.0	3.0	6.5	5.0
Older Couples	3.4	.9	2.8	-	2.1
Retired Couples	-	-	1.1	-	.2
Older Single	.5	-	-	-	.2
Other/Don't Know	6.1	3.3	2.0	.5	4.0
TOTAL SKIERS	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

In the Regional market, the distribution does not follow this trend. Nearly 60% of skiers in the Regional market are from "middle" or "older" families, compared with 38% and 51% in the Calgary and Edmonton based market areas respectively. "Young couples/co-op units" and "young bachelors" constituted 21% of skiers, compared with 39% shown for the same group in Calgary and Region and 28% in Edmonton and Other Major Centres.

The largest source of skiers in the Hinterland market area is "middle families" at 23%. Furthermore, skiers from this market area were more likely (at 21%) than those in any other area to be "young families".

AGE

Table VI.2 shows the age of resident skiers by lifestage.

TABLE VI.2 AGE AND LIFESTAGE OF RESIDENT SKIERS
('000 Skiers)

	13-17 YEARS	18-24 YEARS	25-29 YEARS	30-34 YEARS	35-39 YEARS	40+ YEARS	TOTAL RES.
Young Bachelors	-	4.7	10.3	5.3	2.4	1.3	24.0
Young Couples/ co-op Units	-	31.0	20.0	8.2	3.0	2.0	64.2
Young Families	4.9	2.9	9.6	8.0	4.2	1.5	31.1
Middle Families	47.9	4.3	2.3	7.4	11.0	10.1	83.0
Older Families	33.1	14.1	-	.8	.9	4.2	53.1
Grown Families	-	10.6	1.9	.3	-	1.7	14.5
Older Couples	-	.9	.3	-	-	4.5	5.7
Retired Couples	-	-	-	-	-	.6	.6
Older Single	-	-	-	-	-	.5	.6
Other/Don't Know	-	9.4	.7	.2	-	.7	11.0
TOTAL SKIERS	**85.9**	**77.9**	**45.1**	**30.2**	**21.5**	**27.2**	**287.8**

The study found that 168,000 skiers, or nearly 57% of residents, are aged under 25. Over 85,000 skiers are aged 13 - 17 years. They are the strongest represented five year age group and are living mostly in "middle" and "older families". While the "middle family" adults are strongly represented, it appears those in "older families" do not ski as much. Most skiing in "middle" and "older families" is by the children. There are 51,000 resident skiers, that is 18% of residents, who are aged 18 - 29 years and are members of "young couples/co-op units".

NON RESIDENTS

Non resident lifestage is shown in Table VI.3.

TABLE VI.3 LIFESTAGE OF NON RESIDENT SKIERS BY ORIGIN
(Percent of Skiers)

LIFESTAGE	RESIDENT	- -NON-RESIDENT ORIGIN- - CANADA	U.S.	OTHER	TOTAL NON RESIDENT
Young Bachelors	8.5	21.3	25.4	31.5	22.7
Young Couples/ Co-op Units	22.3	26.3	24.3	25.4	25.9
Young Families	10.7	9.8	5.6	7.5	8.9
Middle Families	28.8	13.0	14.8	9.6	13.1
Older Families	18.3	13.8	10.2	4.1	12.5
Grown Families	5.0	5.3	2.6	6.3	4.9
Older Couples	2.1	1.4	4.5	-	1.9
Retired Couples	.2	.8	2.3	2.2	1.2
Older Single	.2	1.4	4.0	1.6	1.9
Other/Don't Know	3.9	6.9	6.3	11.8	7.0
TOTAL NON RES.	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

The profile of Canadian non residents, by comparison with Alberta residents, shows Canadian non residents are 2 1/2 times as likely as their Alberta resident counterparts to be "young bachelors" and slightly more likely to be "young couples/co-op units". However, "middle" and "older" families are represented far less frequently. Alberta residents are more than twice as likely to be at the "middle family" stage and 1 1/2 times as likely to be "older families" when compared with Canadian non residents.

Residents of the United States demonstrate a similar lifestage profile to Canadian, non residents, except that the proportion of "young bachelors" is 25.4%, even larger than for the Canadian non residents (21.3%) and three times the proportion for residents (8.5%). Skiers resident in the United States and originating from "grown families" comprise a smaller proportion than "grown family" skiers from other market areas. United States residents from "older couples" households comprise a larger proportion of skiers than was found in any other market areas.

DESTINATION

Analysis of lifestage by destination of skier is shown in Table VI.4. The analysis shows the predominance of "young couples/co-op units" as sources of skiers in the resident Rocky Mountain, non resident Rocky Mountain, and resident Out-of-Province markets, and of "middle families" in the Foothills and Flatland market.

TABLE VI.4 SKIER LIFESTAGE BY DESTINATION
(Percent of Skiers)

	CAPTURED			ESCAPING	
	R M S		FOOTHILLS	OUT-OF-	TOTAL
LIFESTAGE	RESIDENT	NON RES.	& FLATLAND	PROVINCE	SKIERS
Young Bachelors	9.4	22.7	3.0	10.8	9.9
Young Couples/ Co-op Units	27.2	25.9	9.9	29.6	22.7
Young Families	8.7	8.9	15.2	10.3	10.6
Middle Families	25.3	13.1	40.5	25.6	27.3
Older Families	14.9	12.5	23.4	14.6	17.6
Grown Families	5.7	4.9	4.6	4.6	5.0
Older Couples	3.2	1.9	.8	1.7	2.1
Retired Couples	-	1.2	.7	-	.3
Older Single	.3	1.9	-	-	.4
Other/Don't Know	5.3	7.0	1.9	2.8	4.1
TOTAL SKIERS	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Very similar trends are shown in this table among the resident Rocky Mountain and Out-of-Province markets. In the Foothills and Flatland market nearly 80% of skiers are from "young", "middle", or "older" families while there is only minimal representation by "young bachelors" and "young couples/co-op units" compared with other markets. The detailed tables and discussions with Foothills and Flatland ski area operators note the importance of young skiers, who are typically members of "young", "middle" and "older families" in the Foothills and Flatland ski market.

SEX AND MARITAL STATUS

Table VI.5 shows the sex of skiers by age group.

TABLE VI.5 AGE AND SEX OF RESIDENT SKIERS

	13-17 YEARS	18-24 YEARS	25-29 YEARS	30-34 YEARS	35-39 YEARS	40+ YEARS	NON RES.	TOTAL RES.	TOTAL SKIERS
Male	56.3	50.1	25.6	17.1	11.7	18.8	20.9	179.6	200.5
	65.5%	64.3%	56.8%	56.5%	54.5%	69.3%	69.5%	62.4%	63.1%
Female	29.6	27.8	19.5	13.1	9.8	8.4	9.1	108.2	117.3
	34.5%	35.7%	43.2%	43.5%	45.5%	30.7%	30.5%	37.6%	36.9%
TOTAL SKIERS	**85.9**	**77.9**	**45.1**	**30.2**	**21.5**	**27.2**	**30.0**	**287.8**	**317.8**
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

The table shows that 63.1% of all skiers, and 62.4% of residents, are male. Male skiers are predominant in each age category. At 69.3%, this is most noticeable in the 40+ age group, but also very marked among the under 25 year olds.

Furthermore, approximately 60% (70% for Foothills and Flatland) of skiers are single. However, this is not surprising due to the disproportionate number of younger skiers.

SOCIO ECONOMIC STATUS

Socio economic status is a measure which combines household income, occupation, and education and is described fully in Appendix 1. Students were identified as a separate group in this analysis due to their very significant representation.

RESIDENTS

Table VI.6 shows the socio economic status of resident skier households.

TABLE VI.6 SOCIO ECONOMIC STATUS OF RESIDENT SKIERS
(Percent of Skiers)

SOCIO ECONOMIC STATUS	RESIDENT ORIGIN - CALGARY & REGION	EDMONTON & O.M.C	REGIONAL MARKET	HINTER-LAND	TOTAL RES.
Upper	15.5	15.2	5.7	17.4	13.8
Middle	24.9	21.0	20.4	27.7	22.9
Lower	9.8	12.8	11.6	21.2	12.1
Student	29.1	38.8	45.9	24.9	35.2
Other/Don't Know	20.7	12.2	16.4	8.8	16.0
TOTAL RESIDENT	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

In each market area, except for the Hinterland market, "student" status was the most prominent. Over a third of all resident skiers are "students". Analysis of the data without the inclusion of responses in the "student" and "other/don't know" groups shows that about half of all remaining skiers are categorized in the "middle" status in each market area.

The Calgary and Region and Edmonton and Other Major Centres market areas both showed over 15% of skiers in the "upper" status. A larger proportion from Edmonton and Other Major Centres (12.8%) than from Calgary (9.8%) fell in the "lower" status category.

The Regional and Hinterland market areas reversed the trend shown by the Calgary and Edmonton dominated market areas, in that both showed greater representation in the "lower" category than in the "upper".

NON RESIDENTS

Table VI.7 shows the socio economic status of non resident skier households.

The table shows that Canadian non resident skier households (29.5%) were more likely to be of "upper" status than were their resident Alberta counterparts (13.8% - Table VI.6) Canadian, non residents were also less likely (at 11.9%) to be from "lower" status households than residents (12.1%).

TABLE VI.7 SOCIO ECONOMIC STATUS OF NON RESIDENT SKIERS
(Percent of Skiers)

SOCIO ECONOMIC STATUS	NON-RESIDENT ORIGIN			
	CANADA	U.S.	OTHER	TOTAL NON RES.
Upper	27.4	41.7	19.1	29.5
Middle	31.5	29.8	33.1	31.3
Lower	11.9	3.5	10.4	10.2
Student	18.9	11.7	11.4	17.1
Other/Don't Know	10.3	13.3	26.0	11.9
TOTAL NON RESIDENT	**100.0**	**100.0**	**100.0**	**100.0**

The households of United States residents were the most likely (at 56%) of all skiers to be categorized as "upper" status. Only 5% of those categorized fell in the "lower" group.

DESTINATION

Analysis of skier socio economic status by destination is shown in Table VI.8.

TABLE VI.8 SKIER SOCIO ECONOMIC STATUS BY DESTINATION
(Percent of Skiers)

SOCIO-ECONOMIC STATUS	CAPTURED			ESCAPING	TOTAL SKIERS
	R M S RESIDENT	R M S NON RES.	FOOTHILLS & FLATLAND	OUT-OF-PROVINCE	
Upper	15.3	29.5	6.8	22.1	15.3
Middle	24.9	31.3	17.9	25.3	23.8
Lower	14.7	10.2	11.0	7.4	12.0
Student	30.0	17.1	50.0	27.4	33.4
Other/Don't Know	15.1	11.9	14.3	17.8	15.5
TOTAL SKIERS	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Although the "student" category is predominant in each of the resident destination categories, the table shows that resident, Out-of-Province skiers are more likely to be from "upper" socio economic status households than are residents in other categories. Resident Rocky Mountain skiers display the broadest status distribution and Foothills and Flatland skiers are the residents least likely to be of "upper" status. Non residents are most likely to be from "middle" or "upper" status households.

SKILL LEVELS

Skiers were asked to state their assessment of their skill level. Table VI.9 shows skiers self-assessment of their skill level by type of destination.

Approximately 50% or more of skiers in each destination category assessed their skill as "intermediate". There was a trend toward higher skill levels among skiers skiing Out-of-Province, compared with other type of destination. A larger proportion of Foothills and Flatland skiers were beginners than were observed in other types of destination.

TABLE VI.9 **SKIER SKILL LEVELS**
(Percent of Skiers)

SKILL LEVEL	CAPTURED R M S RESIDENT	CAPTURED R M S NON RES.	FOOTHILLS & FLATLAND	ESCAPING OUT-OF-PROVINCE	TOTAL SKIERS
Beginner	10.7	12.8	19.7	4.4	13.0
Intermediate	52.9	51.3	55.7	49.7	52.7
Advanced	29.7	28.3	21.2	40.7	29.1
Expert	6.7	7.6	3.4	5.2	5.2
TOTAL SKIERS	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Comparison of skiers from the Calgary Metro and Greater Edmonton areas shows a flatter distribution of skier skill levels in Edmonton, with more Calgary Metro residents in the "Intermediate" and "Advanced" categories and more Greater Edmonton residents classified as "Beginner" or "Expert".

	Calgary Metro	Greater Edmonton
Beginner	8.9	13.4
Intermediate	52.4	50.5
Advanced	32.6	28.6
Expert	6.1	7.5
	100.0%	100.0%

Analysis of the detailed tables shows that "Advanced" and "Expert" skiers skied proportionately more skier days in each destination category than were skied by skiers of the two lower skill classifications. Significantly, advanced level skiers skiing Out-of-Province represented 5.2% of skiers but skied 12.5% of the Out-of-Province skier days.

VII. SKIER MOTIVATION

The study addressed criteria used by skiers to select the destination of their last trip. Table VII.1 notes, in percentages, the frequency with which each criterion was mentioned by skiers as a reason for selecting the destination skied.

TABLE VII.1 REASONS FOR SELECTING THE DESTINATION FOR THE LAST TRIP
(Percent of Skiers)

	DESTINATION				
	CAPTURED			ESCAPING	
REASONS	RMS RESIDENT	RMS NON-RES.	FOOTHILLS & FLATLAND	OUT-OF-PROV.	TOTAL SKIERS
To ski/get away	39.5	34.5	33.7	33.5	36.1
Close to home/ convenient	21.9	6.8	51.3	22.7	24.1
Good skiing	23.6	20.5	14.3	22.7	21.4
Visiting/went with friends/relatives	12.7	22.6	20.5	28.3	19.9
Lots of snow/good conditions	21.1	21.6	2.0	18.0	17.6
Good price/ value/deal	8.9	7.0	13.1	8.8	9.2
New experience	5.6	12.2	3.4	8.4	7.2
Recommended	4.0	7.9	4.7	8.5	6.0
School/community group	3.1	-	13.2	4.9	4.6
Accommodation	4.9	.8	-	7.1	4.0
Friendly ski crowd	3.3	2.1	.8	3.9	2.9
Not crowded	2.7	.6	-	5.9	2.8
For business	1.8	9.1	1.8	-	2.6
Given as gift	1.0	1.5	.8	2.8	1.4
Annual ski pass	1.1	-	2.7	-	.9
Other	3.0	8.2	.9	4.8	4.3
TOTAL SKIERS *	**158.2**	**155.4**	**163.2**	**181.3**	**165.0**

* Totals add up to more than 100% because respondents often had more than one reason for selecting the destination for their last trip.

RESIDENT, ROCKY MOUNTAIN SKIING

Skiers from Calgary and Region were most motivated by skiing quality. Those from Edmonton and Other Major Centres were influenced by a combination of convenience and new experience, such as skiing a new hill or destination; the Regional market skiers were influenced by marketing factors such as price and recommendation, and those from the Hinterland market were motivated by exploring and learning.

The most frequent reason given was "to ski/get away". This was generally evenly distributed among the Rocky Mountain destinations except for Mount Norquay. "Good skiing" was second, with Skiing Louise considerably ahead of the norm. "Proximity to home" was the third most important reason, with Mount Norquay, Fortress Mountain and Marmot Basin featuring considerably ahead of Sunshine Village and Skiing Louise.

"Snow accumulation and conditions" was the fourth most important reason. In this category, Sunshine Village was considerably ahead and Skiing Louise a little ahead of the other Rocky Mountain ski areas.

Sunshine Village

Sunshine Village skiers most frequently gave the reason "to ski/get away". "Snow conditions" was the second most important reason.

Skiing Louise

Those who skied at Skiing Louise distributed their first and second reason almost equally between "to ski" and "good skiing".

Mount Norquay

Mount Norquay skiers were most motivated by "value-for-money" and next by "proximity" (many of these skiers came from the Banff/Canmore area). "Good skiing" was also a factor among these skiers, in fact more so than for any other ski area than Skiing Louise.

Marmot Basin

The Marmot Basin skiers most often quoted the reason "to ski/get away", followed by "proximity/convenience to home". "Good skiing" was also important for these skiers although less so than for those skiing at some other areas.

Fortress Mountain

The selection criteria provided by Fortress Mountain skiers were more evenly distributed than those provided by skiers regarding the other ski areas. "Proximity to home" was the primary reason, closely followed by "value for money" and "to ski". "Visiting/went with friends, or relatives" was the next most common reason, followed by "good skiing".

NON RESIDENT, ROCKY MOUNTAIN SKIING

Non residents quoted most frequently to "to ski/get away", followed by "visiting/went with friends, or relatives", "lots of snow/good conditions" and "good skiing". "New experience" and "business" were also noticeable motivators.

Canadian non residents followed this trend although "Visiting/went with friends, or relatives" and "snow" issues maintained a significantly higher profile than for non residents on the whole.

United States skiers were motivated primarily by the prospect of good skiing and the new experience.

Sunshine Village

Skiers at Sunshine Village rated "snow conditions" as the second most important motivator. While this was mentioned as frequently by Sunshine Village skiers as by those at Skiing Louise, this was the fourth most important reason at Skiing Louise. "Good skiing" and "Visiting/went with friends, or relatives" were the next most important reasons.

Skiing Louise

Non residents at Skiing Louise were most motivated by "skiing". "Visiting/went with friends, or relatives" ranked second, followed closely by "skiing quality" and then "snow conditions". "Recommendations" was quoted more frequently by this group than by other non residents.

Mount Norquay

"Visiting/went with friends, or relatives", "new experience" and "good skiing" followed "skiing" as motivators at Mount Norquay. "Snow conditions" were quoted less frequently by these skiers than by other non residents. While it was not a significant motivator, "lack of crowding" was quoted twice as frequently by the Mount Norquay skiers than it was by other non residents. "Good skiing" also rated higher than for non residents skiing elsewhere.

Marmot Basin

"Skiing", "Visiting/went with friends, or relatives" and "new experience" rated highest for non residents skiing at Marmot Basin. Along with Skiing Louise, "Visiting/went with friends or relatives" was quoted 50% more frequently at Marmot Basin than at Sunshine Village and Mount Norquay and "new experience" was quoted more often at Marmot Basin than by non residents at any other ski area. "Recommendation" was a significant motivator.

"Proximity to home/convenience" rated highest among non residents skiing at Marmot Basin, followed by Mount Norquay.

FOOTHILLS AND FLATLAND

Foothills and Flatland skiers were most motivated by "proximity to home". "Skiing" was the next most important, but "skiing quality" (good skiing and snow conditions) were quite insignificant compared with the ranking for resident Rocky Mountain skiing. The role of the "school/community group" was 2 1/2 times as important a motivator to Foothills and Flatland as it was to any other market. "Friendly ski crowds" did not matter, presumably because of the large proportion of "Visiting/went with friends, or relatives" and the young age of these skiers. "Annual ski

passes" were more important to skiers at Foothills and Flatland ski areas than to those skiing at other types of destinations.

RESIDENT, OUT-OF-PROVINCE SKIING

In the escaping market, similar trends in motivation existed to those found for resident, Rocky Mountain skiing. The most significant differences were in the importance of "Visiting/went with friends, or relatives", "crowding", "gift", and "recommendation" (more than twice as important). "Accommodation" was 50% more important. "Snow conditions" and "skiing quality" were slightly less significant. Interestingly, "close to home/convenient" was quoted slightly more frequently by Out-of-Province skiers than by resident Rocky Mountain skiers. This is associated with geographic location. Lethbridge skiers and skiers from Calgary and Region are located close enough to Out-of-Province destinations that distance is not a significant obstacle.

Skiers who skied in the United States were primarily motivated by "skiing" and they quoted "skiing quality" as the second most important issue. This was also the case among those who skied in Montana, although the Montana skiers quoted "skiing" less frequently and "ski quality" more frequently. "Visiting/went with friends, or relatives" was the most important motivator for those who skied in British Columbia. However, this trend was not followed for those who skied in the Eastern Kootenay ski areas, who were attracted more by "proximity to home", "skiing", and "skiing quality". "Skiing" rated second overall for skiers skiing in British Columbia. "Snow conditions" were an important motivator for those who skied British Columbia, but not so for those who skied Montana. "Proximity to home" was an important motivator for all skiers in the Escaping market.

"Value for money" was quoted more than twice as often by skiers skiing in the United States than it was by those who skied B.C.

"Accommodation" was more important to those who skied in the United States than to those who skied British Columbia, but did not appear to matter in Montana.

SNOW MAKING

Respondents in the survey were asked for their opinion on snow making. This was an "open ended" question. The results have been summarized as either positive, neutral, negative, don't know, or no answer. Table VII.2 summarizes the results of skier opinions about snow making.

TABLE VII.2 **OPINION ON SNOW MAKING**
(Percent of Skiers)

RESPONSE	CAPTURED - RMS RESIDENT	CAPTURED - RMS NON RES.	CAPTURED - F&F	ESCAPING OUT-OF-PROVINCE	TOTAL
Favourable Mentions	10.0	14.7	19.1	19.3	13.9
Neutral Mentions	61.4	50.7	63.3	64.6	61.4
Unfavourable Mentions	30.0	13.9	13.7	20.7	22.5
Don't Know/No Answer	3.4	21.3	7.9	.8	6.0
TOTAL SKIERS*	**104.8**	**100.6**	**104.0**	**105.4**	**103.8**

* Totals are greater than 100% because respondents were permitted more than one response, as the question was explained.

ORIGIN

Among residents, over 60% of answers were found to be neutral, suggesting most resident skiers are uncommitted or uninformed regarding snow making. Of the selective answers (in favour or not in favour) the larger proportion was not in favour of snow making, except for Foothills and Flatland skiers.

Non residents appeared to be less familiar with concepts of snow making.

DESTINATION

Neutral mentions dominated the analysis with the smallest proportion of neutral mentions among the Rocky Mountain skiers and the largest among Flatland skiers.

However, it is clear Foothills and Flatland skiers with an opinion are in favour of snow making, resident Rocky Mountain skiers are not and selective answers provided by skiers in the non resident and Out-of-Province markets are evenly distributed pro and con.

VIII. TRIP EXPERIENCE

A selection of aspects of the overall skiing experience was evaluated in the study.

GENERAL TRIP RATING

Table VIII.1 shows the overall rating of ski trips taken in the captured and escaping markets by resident and non resident skiers.

TABLE VIII.1 GENERAL RATING OF SKI TRIP
(Percent of Skiers)

GENERAL TRIP RATING	CAPTURED			ESCAPING	RES.	TOTAL
	RMS RES.	RMS NON RES.	F&F	OUT-OF-PROVINCE	TOTAL	
Excellent	42.2	46.3	18.2	49.6	37.3	38.1
Good	46.7	49.0	61.8	46.2	50.7	50.6
Fair/Poor	11.1	4.3	20.0	4.2	12.0	11.3
Don't Know/Not Stated	-	.4	-	-	-	-
TOTAL SKIERS	100.0	100.0	100.0	100.0	100.0	100.0
AVERAGE SCORE: GENERAL TRIP RATING	**3.29**	**3.42**	**2.97**	**3.45**	**3.24**	**3.26**
AVERAGE SCORE: FUN, EXCITEMENT, AND ENJOYMENT	**3.56**	**3.56**	**3.30**	**3.58**	**3.48**	**3.50**

SCALE: 4 = Excellent
1 = Poor

The table shows that non residents were generally more satisfied with their ski trip in Alberta than were residents. Over one third of residents and nearly half of the non residents rated their trip as "excellent".

Resident skiers were most satisfied with their Out-of-Province skiing (more so than non residents were with their trip in

Alberta) and least satisfied with their experience in Foothills and Flatland skiing.

Over 55% of skiers rated the fun, excitement and enjoyment aspects of their trip as "excellent". Foothills and Flatland skiers rated this aspect of their experience lower than did Rocky Mountain skiers.

SELECTED ASPECTS OF TRIP

Table VIII.2 shows the average score ratings of selected aspects of the trip. The priority of trip aspects is dictated by overall average ranking.

TABLE VIII.2 TRIP DIMENSION RATING BY DESTINATION
(AVG. SCORE)

OVER-ALL RANK	ASPECT OF TRIP	CAPTURED RMS RES. AVG.	CAPTURED RMS NON RES. AVG.	CAPTURED FOOTHILLS & FLATL. AVG.	ESCAPING OUT-OF-PROVINCE AVG.	OVERALL AVG.
1	Scenery	3.73	3.91	2.85	3.63	3.52
2	Overnight Accommodation	3.23	3.27	3.13	3.55	3.32
3	Ease of Access to Ski Slopes	3.12	3.16	2.89	3.44	3.20
4	Quality of Service at Resort	3.19	3.40	3.04	3.20	3.18
5	Variety of Runs	3.35	3.44	2.61	3.30	3.17
6	Weather Conditions	3.21	2.69	3.21	3.06	3.13
7	Ski Town Itself	3.04	3.18	3.19	3.19	3.11
8	Apres Ski	3.03	3.09	3.00	3.24	3.10
9	Quality of Ski Run Grooming	3.14	3.08	2.72	3.11	3.03
10	Ease of Accessibility from Home	2.90	2.81	3.22	2.86	2.96
11	Snow Conditions	3.05	3.05	2.66	3.03	2.95
12	Total Cost of Trip	2.82	2.93	2.95	3.11	2.91
13	Lift Line Ups	2.91	2.88	2.83	2.97	2.90
14	Number of Skiers on Hill Today	2.87	2.98	2.82	2.90	2.87
15	Quality of Food	2.74	3.04	2.63	3.06	2.80
16	Day Lodge Capacity	2.80	2.80	2.75	2.69	2.77

SCALE: 4 = Excellent
1 = Poor

ROCKY MOUNTAIN SKIING

Resident and non resident Rocky Mountain skiers agreed that scenery and variety of runs were the two most satisfactory criteria, although, in both cases, the non residents rated these criteria higher. Overnight accommodation was the third best liked trip aspect for residents and was ranked the fourth highest by non residents, although its average score was greater for non residents than for residents.

Quality of service at the resort was rated as the third highest factor for non residents and placed fifth for residents. Quality of ski run grooming placed sixth for residents and eighth for non residents. The ski town itself ranked fifth for non residents, but lower for residents.

It is interesting that weather conditions were fourth highest ranked for residents, but placed 16th and last for non residents.

Low levels of satisfaction were evident for day lodge capacity, quality of food, hill crowds, cost, and lift line-ups. In general, these were given low ratings by all skiers.

FOOTHILLS AND FLATLAND

Not surprisingly, the ranking of satisfaction amongst Foothills and Flatland skiers was quite different from that provided by Rocky Mountain skiers in many respects. The best liked features were ease of accessibility from home, weather conditions, the ski town, overnight accommodation, and quality of service at the resort. Least liked were the variety of runs, quality of food, snow conditions, quality of ski run grooming, and day lodge capacity.

ESCAPING MARKET

Among Out-of-Province skiers, scenery again ranked first, followed by overnight accommodation, ease of access to ski slopes, variety of runs, apres ski, and quality of service at resort. These skiers least liked the day lodge capacity, ease of accessibility from home, hill crowding, and lift line-ups.

SUMMARY

In general, similar ranking existed among the resident, and non resident, Rocky Mountain skiers. Different priorities among Foothills and Flatland and Out-of-Province skiers resulted in different ranking of satisfaction.

Some significant differences in ranking exist:

- In the case of weather, Foothills and Flatland skiers (ranked #2) were very satisfied, as were resident, Rocky Mountain skiers (#4). Out-of-Province skiers were less satisfied (#9) and non resident Rocky Mountain skiers least satisfied (#16).
- Apres ski was rated lowest by resident, Rocky Mountain skiers (#10) and highest by the Escaping market (#5).
- Only the Foothills and Flatland skiers were satisfied with ease of accessibility from home.
- Snow conditions were generally rated low, ranging from #8 (resident Rocky Mountain) to #14 (Foothills and Flatland).
- Resident Rocky Mountain skiers were least satisfied with the total cost of their trip (#14).

Rocky Mountain Skiing Destinations

Table VIII.3 shows the ranking of the facets of the trip most and least liked by residents and non residents for each of the Rocky Mountain ski areas in the survey.

TABLE VIII.3 RMS DESTINATIONS: RANKING OF SELECTED CRITERIA

SUNSHINE VILLAGE

MOST SATISFIED WITH		LEAST SATISFIED WITH	
Residents	Non Residents	Residents	Non Residents
Scenery	Scenery	Quality of food	Weather conditions
Snow conditions	Quality of service	Total trip cost	
Overnight accommodation	Snow conditions	Lift line-ups	Lift line-ups
Quality of ski run grooming	Overnight accommodation	Apres ski	Day lodge capacity
Variety of runs	Variety of runs	Quality of service	Ease of access from home
			Ski hill crowding

SKIING LOUISE

MOST SATISFIED WITH		LEAST SATISFIED WITH	
Residents	Non Residents	Residents	Non Residents
Scenery	Scenery	Quality of food	Weather conditions
Variety of runs	Variety of runs	Day lodge capacity	Day lodge capacity
Quality of service	Quality of service	Ski hill crowding	Snow conditions
Weather conditions	Overnight accommodation	Ease of access from home	Ease of access from home
Overnight accommodation	Ease of access to slopes	Total cost of trip	Quality of ski run grooming

MOUNT NORQUAY

MOST SATISFIED WITH		LEAST SATISFIED WITH	
Residents	Non Residents	Residents	Non Residents
Weather condition	Scenery	Ease of access to slopes	Snow conditions
Quality of service	Quality of service	Snow conditions	Day lodge capacity
Scenery	Overnight accommodation	Quality of food	Ease of access from home
Lift line-ups	Ski Town itself	Variety of runs	Total cost of trip
Ski Town itself	Ease of access to slopes	Overnight accommodation	Quality of ski run grooming

MARMOT BASIN

MOST SATISFIED WITH		LEAST SATISFIED WITH	
Residents	Non Residents	Residents	Non Residents
Scenery	Scenery	Day lodge capacity	Ease of access from home
Overnight accommodation	Quality of service	Total cost of trip	Total cost of trip
Variety of runs	Variety of runs	Ease of access from home	Snow conditions
Quality of service	Ski hill crowding	Ski Town itself	Weather conditions
Ease of Access to slopes	Lift line-ups	Ski hill crowding	Quality of food

FORTRESS MOUNTAIN

MOST SATISFIED WITH		LEAST SATISFIED WITH	
Residents	Non Residents	Residents	Non Residents
Scenery	Not Surveyed	Ski Town itself	Not Surveyed
Lift line-ups		Quality of food	
Variety of runs		Overnight accommodation	
Number of skiers		Apres ski	
Quality of service		Snow conditions	

APPENDIX 1: DEFINITIONS

DEFINITIONS

"Banff/Lake Louise"

A downhill ski destination area comprised of the following resorts: Sunshine Village, Skiing Louise and Mount Norquay. This area has been selected for separate identification because of the strong interrelationship between these resorts resulting from their close proximity to one another.

"Captured Market"

That portion of the downhill ski market which accrues inside Alberta. This includes all skier days skied by residents and non residents at each downhill ski resort in Alberta during the study period.

"Escaping Market"

That portion of Alberta's downhill ski market which accrues outside of Alberta. This includes all skier days skied by Alberta residents at downhill ski resorts located outside of Alberta.

"Foothills & Flatland Resorts"
"F & F"

All Alberta ski resorts which were not classified as Rocky Mountain ski areas. For the purpose of this study, these resorts include all those in Alberta which service primarily a resident clientele.

"Lifestage"

The following combination of data was used to define downhill skier households:

- age of chief wage earner
- household size
- presence of children under 18 years of age
- presence of children under 6 years of age

From this information, 9 cells of life stage were created:

1. Young bachelors: under age 45, 1 person households

2. Young couples/cooperative units: under age 45, 2+ persons in household, none under 18

3. Young families: under age 45, 2+ persons in household, children under 6

4. Middle families: under age 45, 2+ persons in household, with older children (7 to 17) only

5. Older families: age 45+, 2+ persons in household, including children (any age)

6. Grown families: age 45+, 3+ persons in household, no children and a head of the household employed

7. Older couples: age 45+, 2 persons in household, no children and a head of the household employed

8. Retired couples: age 45+, 2 persons in household, no children and no employed head of the household

9. Older single: age 45+, 1 person household.

"Non Resident"

Any skier who resides outside the province of Alberta. Non residents include Canadian citizens residing in other provinces and territories and skiers residing outside the country.

"Out-of-Province"

Used in reference to Alberta resident ski destinations not located within Alberta.

"Resident"

Any skier who resides in Alberta, regardless of where he or she skis.

"Rocky Mountain Skiing"
"RMS"

This term refers to the major alpine skiing resorts in Alberta. These resorts include Sunshine Village, Skiing Louise, Mount Norquay, Marmot Basin, and Fortress Mountain.

"Socio Economic Status"

Four respondent groups were created. In light of their number in this type of sample, students were treated as a separate group. The balance was derived from everyone who gave a usable response to the household income, level of education achieved, and personal occupation questions. Each was weighted as follows:

Household Income	Weight
Under $25,000	1
$25,000 to $40,000	2
Over $40,000	3

Level of Education

Completed high school or less	1
Some college, university or other post high school training	2
Completed college or university or post graduate training	3

Respondent Occupation

Skilled or unskilled labourer and pensioner	1
Sales, clerical, armed forces	2
Professional, manager, farmer	3

The sum of the score for each respondent produced the banner:

	Upper	Middle	Lower	Student
Scored	8 or 9	5, 6, 7	3 or 4	-

"Skier Day"

One skier skiing one day, including any day spent by non residents skiing at Alberta destinations or by residents at any destination.

"Tour Package"

A travel package that included at least two items, such as transportation, accommodation, and lift ticket.

APPENDIX 2: QUESTIONNAIRES

APPENDIX 2.1: RESIDENT QUESTIONNAIRE

RESIDENT SKIERS STUDY #9079 - CHRISTMAS/NEW YEAR

MARKET FACTS OF CANADA LIMITED
1240 Bay St., Toronto, M5R 3L9

Good _____. I'm _____ of Market Facts of Canada Limited and we're doing a study about winter recreation and would like you to help us.

1a) First of all, including yourself and any babies, how many people in total are living in your household at the present time?

WRITE IN NUMBER HERE → ☐☐

1b) Now including yourself, how many people are there living in your household who have downhill skied either last season or this season?

WRITE IN NUMBER HERE → ☐☐

IF "NONE", TERMINATE AND RECORD

1c) How many of these downhill skiers are under the age of twelve?

0 1 2 3 4 5 6 7 8 or more (SPECIFY)____

IF NUMBER IN QU.1c SAME AS NUMBER IN QU.1b, TERMINATE AND RECORD

1d) How many people in your household aged twelve years and older have downhill skied this season before January second? (CIRCLE ONE NUMBER BELOW)

IF "NONE", TERMINATE AND RECORD

QU.1d GRID 12

CIRCLE ONE NUMBER →	# OF SKIERS 0	1	2	3	4	5	6 7 8 9 or more
QU.1e NUMBER OF MALES 0	FEMALE SKIER	YOUNGER FEMALE SKIER	YOUNGEST FEMALE SKIER	YOUNGEST FEMALE SKIER	YOUNGEST FEMALE SKIER	YOUNGEST FEMALE SKIER	YOUNGEST FEMALE SKIER
1	MALE SKIER	FEMALE SKIER	YOUNGER FEMALE SKIER	YOUNGEST FEMALE SKIER	OLDEST FEMALE SKIER	YOUNGEST FEMALE SKIER	YOUNGEST FEMALE SKIER
2	X	YOUNGER MALE SKIER	YOUNGER MALE SKIER	YOUNGER FEMALE SKIER	YOUNGEST FEMALE SKIER	YOUNGEST FEMALE SKIER	YOUNGEST FEMALE SKIER
3	X	X	YOUNGEST MALE SKIER	YOUNGEST MALE SKIER	YOUNGER FEMALE SKIER	YOUNGEST FEMALE SKIER	YOUNGEST FEMALE SKIER
4	X	X	X	YOUNGEST MALE SKIER	FEMALE SKIER	YOUNGEST MALE SKIER	YOUNGEST MALE SKIER
5	X	X	X	X	YOUNGEST MALE SKIER	YOUNGEST MALE SKIER	YOUNGEST MALE SKIER
6 7 8 9 or more	X	X	X	X	X	YOUNGEST MALE SKIER	

IF MORE THAN ONE SKIER, ASK:

1e) And how many of these are male? (CIRCLE ONE NUMBER)

For this study we can choose only one person in each household. May I speak to the (PERSON INDICATED ON GRID)? (IF PERSON YOU ARE TALKING TO IS NOT THE QUALIFIED RESPONDENT SAY:) By the way, what is his/her first name?

RECORD HERE → _____

RE-INTRODUCE YOURSELF IF NECESSARY

2a) Before we begin, in which of the following age groups are you? (READ LIST - CIRCLE ONE ONLY)

Under twelve years	1	→ TERMINATE AND RECORD
Twelve to seventeen years	2	
Eighteen to twenty-four years	3	
Twenty-five to twenty-nine years	4	
Thirty to thirty-four years	5	
Thirty-five to thirty-nine years	6	
Forty to forty-four years	7	
Forty-five to forty-nine years	8	
Fifty to fifty-four years	9	
Fifty-five and over	0	

IF RESPONDENT IS NOT PERSON YOU TALKED TO FIRST, ASK QU.2b. OTHERWISE SKIP TO QU.2c

2b) Have you, yourself, done any downhill skiing since the beginning of this season, or not?

Yes	1	
No	2	→ TERMINATE AND RECORD

2c) Since the beginning of this season, how much money, if any, have you, yourself, spent on ski clothing in Alberta?

WRITE IN AMOUNT HERE → $ [ ][ ][ ][ ]

2d) Also since the beginning of this season, how much money, if any, have you, yourself, spent on ski equipment in Alberta?

WRITE IN AMOUNT HERE → $ [ ][ ][ ][ ]

3a1] Since the Christmas-New Year holiday period, but before February 6th, did you do any downhill skiing, or not?

Yes	3	→ SKIP TO PINK QUESTIONNAIRE
No	4	

3a2] During the Christmas-New Year holiday period, did you do any downhill skiing, or not?

Yes	1	→ SKIP TO QU.3b IN WHITE QUESTIONNAIRE
No	2	→ SKIP TO QU.6a IN WHITE QUESTIONNAIRE

3b) On how many different days since the Christmas-New Year holiday period up to February 6th did you do any downhill skiing?

WRITE IN NUMBER HERE → [ ][ ] DAY(S)

3c) Thinking just of (that/those) (NUMBER MENTIONED IN QU.3b) day(s), at which ski area(s) did you do any downhill skiing? (DO NOT READ - CIRCLE AS MANY AS MENTIONED)

ALBERTA	QU.3c Areas skied	QU.3d Number of days skied	QU.3e Weekday	QU.3e Weekend
Canyon Ski Area	1			
Cypress	2			
Drayton Valley	3			
Edmonton Ski Club	4			
Fairview	5			
Fortress Mountain	6			
Grande Prairie	7			
Kinosoo Ridge	8			
Lake Eden Resort	9			
Lake Louise	0			
Long Lake	X			
Marmot Basin	V			
Mt. Norquay	1			
Paskapoo	2			
Rabbit Hill	3			
Silver Summit	4			
Sunshine Village	5			
Swan Ridge	6			
Swiss Valley	7			
Tawatinaw Valley	8			
Westcastle	9			
Other Alberta (SPECIFY) _____				
B.C. (SPECIFY) _____				
U.S. (SPECIFY) _____				
Other (SPECIFY) _____				

IF ONLY "ONE" DAY IN QU.3b SKIP TO QU.3j.

IF MORE THAN ONE AREA MENTIONED IN QU.3c, ASK QU.3d FOR EACH AREA. OTHERWISE SKIP TO QU.3e.

3d) On how many of those (NUMBER IN QU.3b) did you ski at (SKI AREA)? (RECORD NUMBER) _____

FOR EACH AREA MENTIONED IN QU.3c, ASK:

3e) When you were skiing at (SKI AREA), how many of these days, if any, were on a weekday from Monday to Friday and how many were on a weekend? (WRITE IN NUMBER) _____

3f) Were these ski days during this period ... (READ LIST - CIRCLE ONE ONLY)

all one trip away from home ---------- 1 → SKIP TO QU.3i

Or more than one trip from home -------- 2

IF ONE TRIP IN QU.3f AND MORE THAN ONE AREA IN QU.3c, SKIP TO QU.3L.

IF MORE THAN ONE TRIP IN QU.3f AND ONLY ONE AREA IN QU.3c, SKIP TO QU.3i.

3g) Of these occasions, I'd like you to think about the last trip you made since the end of the holiday period and February 6th. It may have been just for a couple of hours or for a few days, but I need to know about the last outing. To which ski area did you go?

WRITE IN NAME → _____

IF NECESSARY ASK QU.3h. OTHERWISE INTERVIEWER COMPLETE.

3h) In which province or state is that ski area located? (DO NOT READ LIST - CIRCLE ONE)

Alberta ---------- 1

B.C. ------------- 2

California ------- 3

Colorado --------- 4

Idaho ------------ 5

Montana ---------- 6

Other (SPECIFY)_____

3i) Thinking just of that/the last trip during that period, how many days did you ski there?

WRITE IN NUMBER → [ ][ ] → IF MORE THAN 01 SKIP TO QU.3L

3j) Was this on a ... (READ LIST - CIRCLE ONE)

weekday from Monday to Friday- 1

Or a weekend? ------------------- 2

3k) What was the date of that outing?

WRITE IN → _____ DAY _____ MONTH → SKIP TO QU.4a

3L) What date did you leave home and what date did you return home?

WRITE IN → DATE LEFT HOME _____ DAY _____ MONTH

DATE RETURNED _____ DAY _____ MONTH

3m) On that occasion, did you stay ... (READ LIST - CIRCLE ONE)

at the home of friends or relatives ------ 1

at a hotel, motel or lodge --------------- 2

at a guest house or hostel --------------- 3

at your own cottage or condominium ------- 4

at a campsite ---------------------------- 5

Or just where did you stay (SPECIFY)_____

4a) How many other people from your own household, if any, were skiing with you on that trip?

WRITE IN NUMBER HERE → [ ][ ] 28 29

4b) Which of the following did you use on that trip? (READ LIST - CIRCLE AS MANY AS MENTIONED)

Air ---------- 1 30
Private car ---------- 2
Rental car ---------- 3
Train ---------- 4
Scheduled bus ---------- 5
Chartered bus ---------- 6
Taxi ---------- 7

Or Just what (SPECIFY)_____

_____

4c) Were you on a tour package, that is, one that included at least two items such as transportation, accommodation, and lift tickets, or not?

Yes ----- 1 31
No ------ 2 → SKIP TO QU.5

4d) What is the name of that tour package?

WRITE IN → _____ 32 33 34

4e) In total, how much did the tour package cost you (and other household members travelling with you)?

WRITE AMOUNT IN HERE → $[,][ ][ ] 35 36 37 38 39

4f) Not including those things covered in your tour package, how much did you (and the other household members travelling with you) spend in total (while you were outside Alberta), including any credit card purchases, on ... (READ EACH ITEM SEPARATELY AND RECORD AMOUNT)

Meals and refreshments? ---------- $[ ][ ][ ] 40 41 42

Accommodation or lodging? ---------- $[ ][ ][ ] 43 44 45

Car expenses, including gas, oil, and any maintenance or repair? ---------- $[ ][ ][ ] 46 47 48

Any other transportation while in the area? --- $[ ][ ][ ] 49 50 51

Ski equipment and clothing? ---------- $[ ][ ][ ] 52 53 54

Lift tickets? ---------- $[ ][ ][ ] 55 56 57

Ski equipment rental? ---------- $[ ][ ][ ] 58 59 60

Ski school lessons? ---------- $[ ][ ][ ] 61 62 63

Recreation and entertainment including apres ski? ---------- $[ ][ ][ ] 64 65 66

Any other expenses? ---------- $[ ][ ][ ] 67 68 69 → SKIP TO QU.6

79-0
80-7

cd. 8

5. Including any credit card purchases, how much did you (and other household members travelling with you) spend, in total (while you were outside Alberta), on ... (READ EACH ITEM SEPARATELY AND RECORD AMOUNT)

Meals and refreshments?	$		5 / 8
Accommodation or lodging?	$		9 / 12
Car expenses, including gas, oil, and any maintenance or repair?	$		13 / 16
Any other transportation while in the area?	$		17 / 20
Ski equipment and clothing?	$		21 / 24
Lift tickets?	$		25 / 26
Ski equipment rental?	$		27 / 29
Ski school lessons?	$		30 / 32
Recreation and entertainment including apres ski?	$		33 / 35
Any other expenses?	$		36 / 38 → SKIP TO QU.6

34-41 B.K.

CD 1

ASK EVERYONE

6. What were some of the reasons for your going to (SKI AREA MENTIONED IN QU.3c/3h) on this trip you've been telling me about? ... What else? ... Anything else?

-42
-43
-44

REFER TO QU.3b/QU.3i - IF [0|1] IN ANY, SKIP TO QU.8

7. Using a scale of "excellent", "good", "fair", or "poor", please tell me how you would rate the ... (READ EACH STATEMENT - CIRCLE ONE ONLY)

	Excellent	Good	Fair	Poor	
Trip, in general?	1	2	3	4	-45
Total cost of this trip?	1	2	3	4	-46
Ease of accessibility from home?	1	2	3	4	-47
Ease of access to ski slopes?	1	2	3	4	-48
Overnight accommodation?	1	2	3	4	-49
Quality of food?	1	2	3	4	-50
Quality of service at the ski resort?	1	2	3	4	-51
Après ski?	1	2	3	4	-52
Ski town itself?	1	2	3	4	-53
Scenery?	1	2	3	4	-54
Fun, excitement and enjoyment?	1	2	3	4	-55
Snow conditions?	1	2	3	4	-56
Quality of ski run grooming?	1	2	3	4	-57
Variety of ski runs for you?	1	2	3	4	-58
Number of skiers on the hill today?	1	2	3	4	-59
Day lodge capacity?	1	2	3	4	-60
Lift line ups?	1	2	3	4	-61
Weather conditions?	1	2	3	4	-62

ASK "ONE" DAY SKIERS ONLY

SKIP TO INSTRUCTION BEFORE QU.9a

8. Using a scale of "excellent", "good", "fair", or "poor", please tell me how you would rate the ... (READ EACH STATEMENT - CIRCLE ONE ONLY)

	Excellent	Good	Fair	Poor	
Trip, in general?	1	2	3	4	-63
Total cost of this trip?	1	2	3	4	-64
Ease of accessibility from home?	1	2	3	4	-65
Quality of food?	1	2	3	4	-66
Quality of service at the ski resort?	1	2	3	4	-67
Scenery?	1	2	3	4	-68
Fun, excitement and enjoyment?	1	2	3	4	-69
Snow conditions?	1	2	3	4	-70
Quality of ski run grooming?	1	2	3	4	-71
Variety of ski runs for you?	1	2	3	4	-72
Number of skiers on the hill?	1	2	3	4	-73
Day lodge capacity?	1	2	3	4	-74
Lift line ups?	1	2	3	4	-75
Weather conditions?	1	2	3	4	-76

TRD
80-8

REFER TO QU.3c IF ONLY ALBERTA SKI AREAS MENTIONED, ASK QU.9a - ALL OTHERS SKIP TO INSTRUCTIONS BEFORE QU.9b

9a) Since the beginning of the nineteen eighty-three - eighty-four season, have you done any skiing downhill outside of Alberta, or not?

Yes ----- 1
No ------ 2 → SKIP TO QU.10

IF "LAST TRIP" WAS AT AN ALBERTA SKI AREA, ASK QU.9b, OTHERWISE SKIP TO QU.10.

9b) At which ski area outside Alberta were you most recently?

WRITE IN NAME → _____

9c) Thinking of just that trip, on how many days were you skiing at (SKI AREA)?

WRITE IN NUMBER → [ ][ ]

9d) How many other people from your own household, if any, were skiing with you on that trip?

WRITE IN NUMBER → [ ][ ]

9e) Was it a tour package, that is, one that included at least two items such as transportation, accommodation, and lift tickets, or not?

Yes ----- 1
No ------ 2 → SKIP TO QU.9i

9f) What is the name of that tour package?

WRITE IN → _____

9g) In total, how much in Canadian dollars did the tour package cost you (and other household members travelling with you)?

WRITE AMOUNT IN HERE → $[ ][ ][ ][ ][ ]

9h) Not including those things covered in your tour package, how much money in Canadian dollars did you (and the other household members travelling with you) spend in total, including any credit card purchases while you were outside Alberta?

WRITE IN AMOUNT HERE → $[ ][ ][ ][ ] → SKIP TO QU.9j

9i) How much, in total, in Canadian dollars did you (and the other household members travelling with you) spend outside Alberta while you were on that trip? Please include any credit card purchases?

WRITE IN AMOUNT HERE → $[ ][ ][ ][ ]

9j) By the way, what date did you leave home to go on this ski trip and what date did you return?

DATE LEFT ____ DAY ____ MONTH

DATE RETURNED ____ DAY ____ MONTH

ASK EVERYONE

10. Finally, in what way, if any, does "snow-making" affect your choice of a ski area?

[ ]

BASIC DATA

Now I have some questions that will help us to group our interviews.

A. How would you classify yourself as a downhill skier? Are you a ... (READ LIST - CIRCLE ONE)

beginner ---------- 1
intermediate ------ 2
advanced ---------- 3
Or expert ---------- 4

B. What is your occupation; that is what type of work do you do? Please describe fully.

_____

C. What was the last grade of schooling you, yourself, completed? (DO NOT READ LIST - CIRCLE ONE ONLY)

Some or completed grade school ---- 1
Some or completed high school ----- 2
Some college or university -------- 3
Completed college or university --- 4
Post graduate ------------------- 5
Other post high school training --- 6

Other (SPECIFY)_____

_____

D. Are you at present ...? (READ LIST - CIRCLE ONE)

single --------- 1
married -------- 2
widowed -------- 3
separated ------ 4
Or divorced? ------ 5

CD 14

.E. Is the chief wage earner in your household aged ... (READ LIST - CIRCLE ONE)

forty-four years or younger --- 1 -#6
Or forty-five years or older ----- 2

F. Including yourself and any babies, in which age group is the youngest member of your household? (READ LIST - CIRCLE ONE)

Under six years old --------- 1 -#7
Six to eleven years --------- 2
Twelve to seventeen years --- 3
Eighteen years or older ----- 4

G. Finally, in which of the following groups was the total household income in 1983, before taxes? (READ LIST - CIRCLE ONE ONLY)

Under $25,000 ---------- 1 -#8
$25,000 to $40,000 ------- 2
Or Over $40,000 ---------- 3

H. Sex (INTERVIEWER RECORD)

Male ------ 1 -#9
Female ---- 2

ASK AND RECORD ON TOP PAGE:

NAME
ADDRESS
POSTAL CODE
CHECK TELEPHONE #

THANK YOU VERY MUCH FOR PARTICIPATING IN THIS SURVEY!

#9079

79-1
80-7

APPENDIX 2.2: NON RESIDENT QUESTIONNAIRE

NON-RESIDENT SKIER SURVEY #9079

MARKET FACTS OF CANADA LIMITED
1240 Bay St., Toronto M5R 3L9

MR. [ ]
MRS. [ ]
MS. [ ]
MISS [ ]

FIRST NAME _____ SURNAME _____

PHONE #: [ ][ ][ ] [ ][ ][ ] [ ][ ][ ][ ] 5-7
AREA CODE

ADDRESS: _____

DATE: _____

CENTRE: _____

SITE: 8
LAKE LOUISE ---------- 1
MARMOT ---------- 2
MT. NORQUAY ---------- 3
SUNSHINE ---------- 4

PROVINCE/STATE: _____

COUNTRY: 9
CANADA ---------- 1
U.S. ---------- 2
JAPAN ---------- 3
OTHER (SPECIFY) _____

LOCATION OF INTERVIEW: 12
MAZE ---------- 1
CABLE CAR ---------- 2
LOWER AREA ---------- 3
UPPER AREA ---------- 4
RESTAURANT ---------- 5
TICKET AREA ---------- 6
HOTEL ---------- 7
OTHER (SPECIFY) _____

TIME STARTED: _____ [ ]a.m. [ ]p.m. 10

TIME FINISHED: _____ [ ]a.m. [ ]p.m. 11

QUOTAS: 13
WEEKDAY ---------- 1
WEEKEND ---------- 2

14
HOLIDAY ---------- 1
EARLY WINTER ----- 2
LATE WINTER ------ 3
SPRING ---------- 4

NAME OF SUPERVISOR

"I hereby certify that this interview was conducted according to the questionnaire and instructions for this study and that answers recorded are as given to me by this respondent.

I also realize that a proportion of my work will be checked back with the respondent for verification."

(Interviewer's Signature)

INTRODUCTION

Good_____. I am_____. We are conducting a survey on behalf of Travel Alberta and would like to include you in it. (IF INTERVIEWING HAS BEEN CONDUCTED IN AREA EARLIER IN WEEK OR WEEK BEFORE, ASK:) Have you been interviewed while you've been skiing in the (Banff-Lake Louise/Jasper) area or not?

Yes ----- 1 → THANK, TERMINATE AND RECORD

No ------ 2 → CONTINUE

1a) Before we begin, I'd just like to confirm a couple of things. Do you ... (READ LIST - CIRCLE ONE ONLY)

live in Alberta at the present time ----- 1 → TERMINATE AND RECORD.

Or live outside the province ---------- 2

1b) In which of these age groups are you? (SHOW LIST) Just tell me the letter. 15

X Under 12 -- 1 → TERMINATE AND RECORD
R 12 - 17 --- 2
N 18 - 24 --- 3
W 25 - 29 --- 4
F 30 - 34 --- 5
H 35 - 39 ---- 6
Q 40 - 44 ---- 7
G 45 - 49 ---- 8
A 50 - 54 ---- 9
L 55+ -------- 0

2a) Is this trip your first visit to an Alberta ski area, or not?

Yes ----- 1 -16 No ------ 2

2b) Is the MAIN purpose of this visit ... (READ LIST - CIRCLE ONE)

-17
to take a ski vacation? ---------- 1
Or is the skiing combined with visiting friends or relatives? ---------- 2
with a convention? ---------- 3
with other business? ---------- 4
Or with something else? ---------- 5

3a) Altogether, how many days are you planning to spend in the (Banff-Lake Louise/ Jasper) area?

WRITE IN NUMBER → [ ][ ] 18 19

3b) How many of these days, if any, are ... (READ LIST - RECORD NUMBER)

on a weekday from Monday to Friday ----- [ ][ ] 20 21

AND how many are on a weekend ---------- [ ][ ] 22 23

3c) On this trip, are you staying ... (READ LIST - CIRCLE ONE)

-24
at the home of friends or relatives -- 1 Or just where are you staying (SPECIFY)
at a hotel, motel or lodge ---------- 2
at a guest house or hostel ---------- 3
at your own cottage or condominium --- 4
at a campsite ---------- 5

_____

3d) How many other people from your own household, if any, are skiing with you on this trip?

WRITE IN NUMBER HERE → [ ][ ] 25 26

3e) In coming to Alberta which of the following did you use? (READ LIST - CIRCLE AS MANY AS MENTIONED)

-27
Air ---------- 1 Or Just what (SPECIFY)
Private car ---------- 2
Rental car ---------- 3
Train ---------- 4
Scheduled bus -------- 5
Chartered bus -------- 6
Taxi ---------- 7

_____

_____

4a) Are you on a tour package, that is, one that included at least two items such as transportation, accommodation, and lift tickets, or not?

-28
Yes ----- 1
No ------ 2 → SKIP TO QU.5a

4b) What is the name of that tour package? WRITE IN → _____

4c) In total, how much did this tour package cost you (and other household members travelling with you)?

WRITE AMOUNT IN HERE → $[ ][ ][ ][ ][ ] 29 30 31 32 33

4d) Is that amount ... (READ LIST - CIRCLE ONE)

-34
in Canadian dollars? ------- 1 Or which currency (SPECIFY)
in U.S. dollars? ---------- 2

_____

4a) Apart from that amount, how much money do you (and your household members travelling with you) expect to spend on this trip, in total? Please include any accommodation and food costs, lift tickets, equipment rentals, ski school, apres ski, transportation to and from the hill, souvenirs and gifts, and any credit card purchases.

WRITE IN AMOUNT HERE → $[ ][ ][ ][ ] → SKIP TO QU.6a

5a) What expenses did you incur in Alberta on transportation to get to where you are staying here?

WRITE IN AMOUNT HERE → $[ ][ ][ ][ ]

5b) And apart from that amount, how much money do you (and your household members travelling with you) expect to spend on this trip, in total? Please include accommodation and food costs, lift tickets, equipment rentals, ski school, apres ski, transportation to and from the hill, souvenirs and gifts, and any credit card purchases.

WRITE IN AMOUNT HERE → $[ ][ ][ ][ ]

6a) On this trip, what other ski areas, if any, have you skied? ... Any others? (WRITE IN NAME(S))

QU.6a Area skied	QU.6b Number of days skied	QU.6c Mon.	Tues.	Wed.	Thurs.	Fri.	Sat.	Sun.
_____	[ ][ ]	1	2	3	4	5	6	7
_____	[ ][ ]	1	2	3	4	5	6	7
_____	[ ][ ]	1	2	3	4	5	6	7
_____	[ ][ ]	1	2	3	4	5	6	7

No others skied --- [ ]0 → SKIP TO QU.7a

FOR EACH AREA MENTIONED IN QU.6a ASK:

6b) In total, on how many days did you ski at (AREA)? (RECORD NUMBER)

6c) On which day/days of the week did you ski at (AREA)? (CIRCLE AS MANY AS MENTIONED)

7a) What were some of the reasons for your coming to ski in the (Banff-Lake Louise/Jasper) area? ... What else? ... Anything else?

7b) Using a scale of "excellent", "good", "fair", or "poor", please tell me how you would rate the ... (READ EACH STATEMENT - CIRCLE ONE ONLY)

	Excellent	Good	Fair	Poor
Trip, in general?	1	2	3	4
Total cost of this trip?	1	2	3	4
Ease of accessibility from home?	1	2	3	4
Ease of access to ski slopes?	1	2	3	4
Overnight accommodation?	1	2	3	4
Quality of food?	1	2	3	4
Quality of service at the ski resort?	1	2	3	4
Apres ski?	1	2	3	4
Ski town itself?	1	2	3	4
Scenery?	1	2	3	4
Fun, excitement and enjoyment?	1	2	3	4
Snow conditions?	1	2	3	4
Quality of ski run grooming?	1	2	3	4
Variety of ski runs for you?	1	2	3	4
Number of skiers on the hill today?	1	2	3	4
Day lodge capacity?	1	2	3	4
Lift line ups?	1	2	3	4
Weather conditions?	1			

7c) In what way, if any, does "snow-making" affect your choice of a ski area?

5-
6-

BASIC DATA

Finally I have some questions that will help us to group our interviews.

A. How would you classify yourself as a downhill skier? Are you a ... (READ LIST - CIRCLE ONE) 7

beginner	1	advanced	3
intermediate	2	Or expert	4

B. What is your occupation; that is what type of work do you do? (PLEASE DESCRIBE FULLY) 8

C. What was the last grade of schooling you, yourself, completed? (DO NOT READ LIST - CIRCLE ONE ONLY) 9

Some or completed grade school	1	Other post high school training	6
Some or completed high school	2	Other (SPECIFY)	
Some college or university	3		
Completed college or university	4		
Post graduate	5		

D. Are you at present ...? (READ LIST - CIRCLE ONE) 10

single	1	separated	4
married	2	Or divorced?	5
widowed	3		

E. Is the chief wage earner in your household aged ... (READ LIST - CIRCLE ONE) 11

forty-four years or younger	1
Or forty-five years or older	2

F. Including yourself and any babies, in which age group is the youngest member of your household? (READ LIST - CIRCLE ONE) 12

Under six years old	1	Twelve to seventeen years	3
Six to eleven years	2	Eighteen years or older	4

G. Also including yourself and any babies, how many people in total are living in your household at the present time?

WRITE IN NUMBER HERE → 13 14

H. Finally, in which of the following groups was the total household income in 1983, before taxes? (SHOW LIST) Just tell me the letter. (CIRCLE ONE) 15

L	Under $25,000	1	
R	$25,000 - $40,000	2	
Or N	Over $40,000	3	

I. Sex (INTERVIEWER RECORD) 16

Male	1
Female	2

ASK AND RECORD ON TOP PAGE:

- NAME
- ADDRESS
- COUNTRY OF RESIDENCE
- TELEPHONE NUMBER

ALSO RECORD:

- SITE
- LOCATION OF INTERVIEW
- TIME STARTED AND FINISHED
- QUOTAS
- SIGN THE QUESTIONNAIRE

17-0
18-2

#9079

THANK YOU VERY MUCH FOR PARTICIPATING IN THIS SURVEY!

APPENDIX 3: MARKET AREAS

MARKET AREAS

Calgary & Region

- Calgary Metro
- Other Calgary

Edmonton & Other Major Centres (OMC)

- Edmonton Metro)
- Greater Edmonton) combined: described in report as "Greater Edmonton"
- Jasper/Hinton/Edson
- Lethbridge
- Red Deer

Regional

- Grande Prairie
- Medicine Hat
- Rural Communities
  (as Map I.1, Page 5)

Hinterland
(as Map I.1, Page 5)